



FOR PROFESSIONAL FLEET MANAGERS DECEMBER 1991

**Motor
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Safety
Ratings**

Countdown

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CCJ

VOLUME 148 NUMBER 12 DECEMBER 1991

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Maintenance & Technology: Page 58

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40 POINT/COUNTERPOINT: CARRIER SAFETY RATINGS: DO THEY WORK?

Some folks say carrier safety ratings issued by the DOT are worthless. But others strongly disagree. So let the battle begin... between CCJ staffers Rich Cross (acting as devil's advocate) and Parry Desmond (acting as safety advocate).

45 PRODUCT EVALUATION: WESTERN STAR 4964F

At first glance, Western Star's custom-looking 4964F might seem an unlikely candidate for fleet service. But after a closer look, CCJ's Product Evaluation team found more than just a pretty face.

49 AHEAD OF THE CROWD: 1991 PRODUCT LEADERS

Fleets consume vast amounts of tires, fuel, parts, etc., that fill the pages of CCJ's Products & Services section. In each issue, one or two items earn the label "unique" and attract the attention of a large number of readers. Here are the products that stirred the most interest in the past 12 issues.

7 EDITORIAL

OMC TO STREAMLINE SAFETY RULES AND REGS—Few would dispute the need to take a fresh look at federal motor carrier safety requirements and, in effect, start over.

31 BUSINESS SIDE

IS GOOD FOR THE GOOSE: GOOD FOR THE GANDER?—When CEOs were asked if deregulation of trucking was good or bad for the U.S. economy their responses were split almost evenly.

37 SAFETY & ENVIRONMENT

HOW TO HELP YOURSELF AND YOUR COMPANY—Want to stay on top of DOT's and EPA's newest regulations? Consider joining the Safety Management Council of ATA.

57 MAINTENANCE & TECHNOLOGY

TRACKING FOR DOLLARS—for many U.S. carriers, satellite positioning and communication technology have revolutionized commercial transport. And it promises only to get better.

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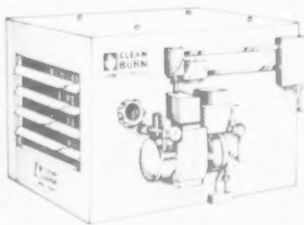
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2 COMMERCIAL CARRIER JOURNAL December 1991

IN THE NEXT ISSUE

Readers of Paul Richards' January cover story on how to rebuild foundation brakes will learn there's more to a brake job than swapping shoes.

The photo essay will show why the process of relining reveals how the conditions of all the brake components explain reasons for premature lining wear, prior or current brake problems,

and problems around the next corner.

The issue also will include the latest ASIA Heavy Duty Distributor Fleet Product and Service Directory.

The directory lists some 500 companies which specialize in new, rebuilt and/or remanufactured replacement parts and equipment. □

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Logistics survey shows customer service still weak

American companies reportedly are making strides toward upgrading customer service and quality improvement. But, according to a study commissioned by the Council of Logistics Management, about 90% of U.S. firms still have problems delivering materials and products to customers along the supply chain.

The study, entitled *Improving Quality and Productivity in the Logistics Process*, was conducted by A.T. Kearney Inc. Based on the survey of 450 manufacturers, distributors, retailers and their customers, Patrick Byrne, Kearney vice president, says management should draw four conclusions from the study:

1. Customer satisfaction is the strategy for the 1990s.

Logistics Service Level Improvements (Service Failures per Million Occurrences)				
Service Dimension	Survey Average		Most Successful Companies	
	1990 Actual	1995 Goal	1990 Actual	1995 Goal
On-time deliveries	84,000	30,000	10,000	1,000
Order completeness	104,000	50,000	41,000	10,000
Invoice accuracy	57,000	21,000	10,000	0

Based on A.T. Kearney survey of 450 suppliers and customers

2. The quality of service a company provides is the differentiating factor in satisfying customers.

3. The logistics process—the management of the flow of materials from the raw material source to the ultimate consumer—will drive service quality.

4. The chief operating officer must lead the logistics process.

Two-thirds of the survey participants have formal quality and productivity improvement programs in place. But only 55% of their improvement processes include their logistics performance.

Thus, claims Byrne, 45% of the participants "are already at a disadvantage if they compete on customer service. If they do not act soon, they may fall so far behind that they can never recover."

However, the study revealed that many suppliers are getting their logistics act together. Participants' late deliveries dropped 55% between 1985 and '91. The late delivery figure for 1985-1995 is expected to decline by 84%.

Copies of the report can be purchased from: Book Sales Dept., Council of Logistics Management, 2803 Butterfield Rd. #380, Oak Brook, Ill. 60521. 708-574-0985. □

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CABMATE [IMPROVES THE RIDE CUTS CAB MAINTENANCE COSTS

April, 1991: We asked owners of 1,500 Cabmate's about their level of satisfaction. Here's what they told us...

Estimated Ride Improvement

% Ride Improvement	Response
5-25%	8.8%
25-50%	29.7%
50-75%	35.2%
75-100%	13.1%
100%+	4.4%
N/A	3.3%

Cab Maintenance Savings

% Savings	Response
10-20%	33.3%
20-30%	36.4%
30-40%	12.1%
40%+	18.2%

We couldn't have said it better!

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Correction

The Typo Gremlin crept into the chart that was part of the Routing and Dispatching software feature published in CCI's October issue. It was incorrectly noted that the Routronics 2000 system marketed by Carrier Logistics, Rye Brook, N.Y., 914-939-3900, is for truckload fleets. Wrong! That system is for less-than-truckload carriers. □

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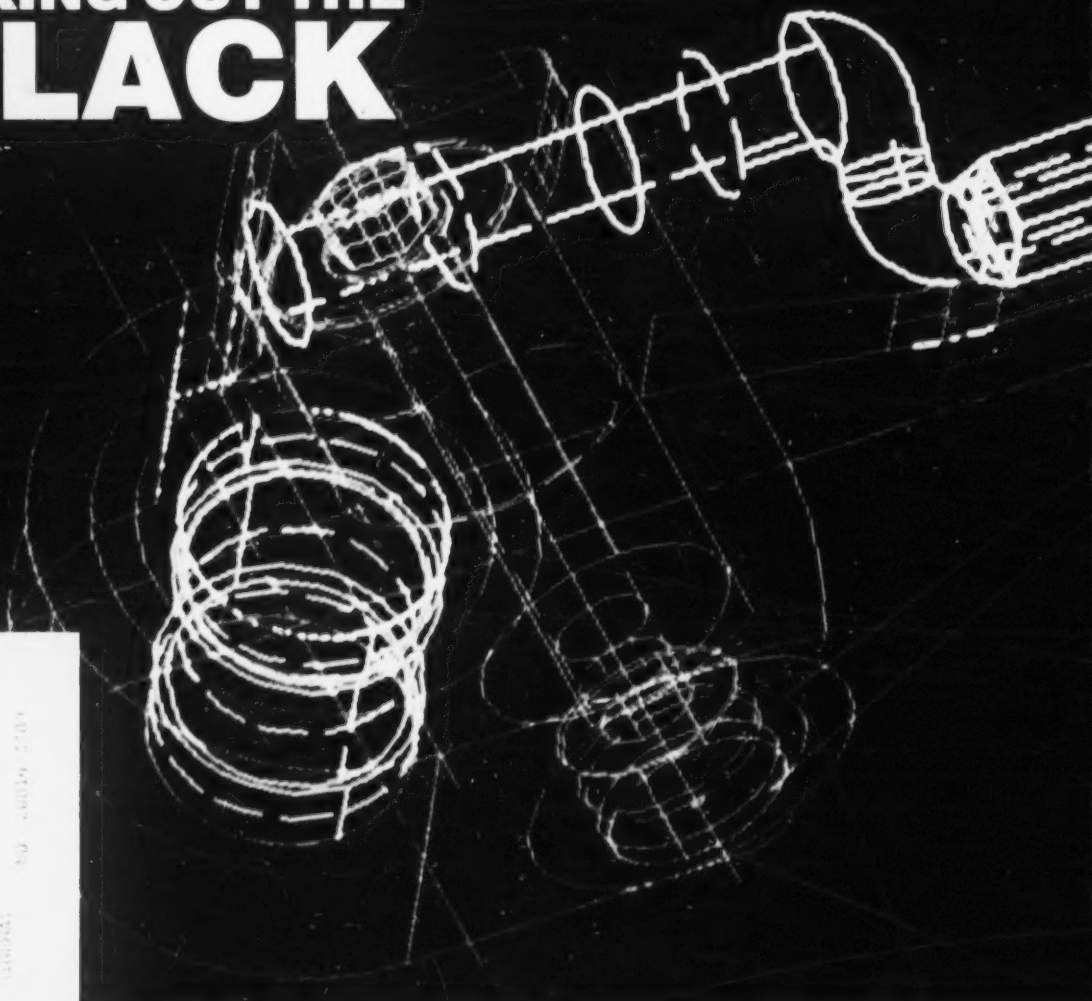
CHILTON'S COMMERCIAL CARRIER JOURNAL

CCJ

FOR PROFESSIONAL FLEET MANAGERS MARCH 1992

AUTOMATIC BRAKE ADJUSTMENT

TAKING OUT THE SLACK



MAINTENANCE ALERT NEW CVSA ROADSIDE INSPECTION CRITERIA

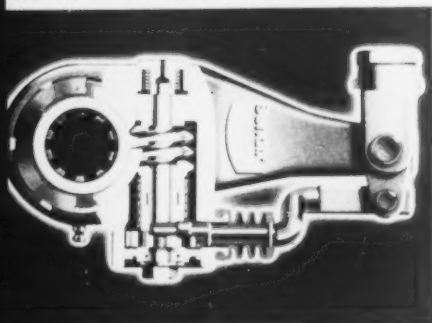
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Criteria for placing vehicles out of service at roadside safety inspections is established jointly by the DOT and the CVSA. Here are the latest revisions.

67 AUTOMATIC BRAKE ADJUSTERS: TAKING OUT THE SLACK

Statistical evidence and common sense overwhelmingly favor the use of ABAs for all but a few specialized operators.

75 THE TRUTH ABOUT DOWNHILL BRAKING

Millions of truckers have been given bad advice about safe braking on downgrades. The truth is revealed here.

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SAFE DOWNHILL BRAKING—Some of the best minds in heavy-truck brake design are worried. They say drivers are being taught the wrong way to brake safely on long downhill grades.

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EDS ENTERS MIS MARKETPLACE—EDS runs the largest private telecommunications and computing network. And it plans to generate millions of documents for fleets.

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NHTSA PROPOSES TRAILER-UNDERRIDE GUARDS—The latest step in a pursuit of rulemaking that began a quarter-century ago, after actress Jayne Mansfield was decapitated when her car underrode a truck.

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BRAKING A FULL-CONTACT SPORT—What if you do the best brake work possible, but only a small percentage of the lining area is in contact with the drum?

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This month's cover features a computer-aided, slack adjuster design drawing supplied by Bendix Heavy Vehicle Systems, Elyria, Oh.

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IN THE NEXT ISSUE

The April edition will include
CCJ's Fleet Operations Annual.
That special section will offer
carrier managers valuable, up-to-
date information on reciprocity
agreements, states' fuel and pri-
mary weight-distance taxes and
access policies, phone numbers
of state agencies that administer
licensing, tax, fuel reporting reg-
ulations.

The issue also will have a fea-
ture that focuses on short-term
vs. long-term leased equipment
strategies. Leasing companies
and their fleet customers will
provide readers with cost-effec-
tive examples of how to take
advantage of many available op-
tions when they lease or rent
tractors and trailers for less than
a year. □

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EDS enters MIS marketplace

By PARRY DESMOND
Executive Editor
215-964-4529

Use of a data shouldn't be limited to task-oriented applications which ultimately only impact 3% of a fleet's total operation. Instead of being isolated, insists John Meyer, vice president of the Transportation Div. of Electronic Data Systems (EDS), that data should be integrated with other information elements of a company's operation so managers can make better business decisions.

EDS, a \$6 billion company, operates the world's largest private telecommunications and computing network. Although its system has yet to crank out one freight bill for a fleet-client, EDS plans to soon begin generating millions of documents for fleets.

Despite its lack of experience with for-hire fleets, EDS won't have to re-invent the wheel in order to serve trucking customers. The company's 60,000 employees offer computer-related services to 26 industries, many of which have needs similar to trucking's.

For example, EDS wants to introduce to trucking the "yield management" pricing system it developed for hotel chains, airlines and National Car Rental. With yield management, carriers constantly update and access their historical cost databases so each load's pricing accurately reflects specific information for moving different types of freight.

Other examples of services EDS can offer truckers include:

- EDS showed General Motors, its parent company, how to save \$100 million annually on administering its health insurance program.

EDS knows a little about health insurance: it processes two of every three medical claims filed in the U.S. The company founded by Ross Perot also developed an electronic data interchange (EDI) system for GM.

- EDS wouldn't have a problem setting up a cash advance system for drivers since it runs the nation's third largest automatic teller machine network for the banking industry.

Why enter the trucking arena?

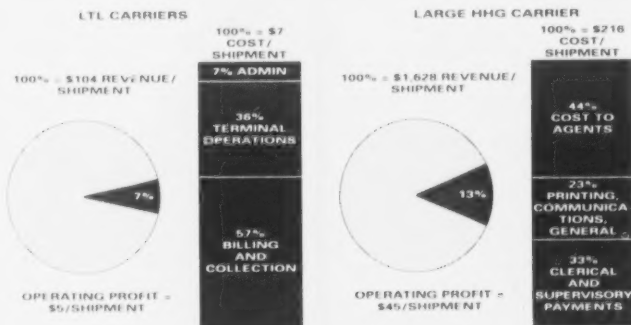
EDS has entered the tracking arena because it knows that motor carriers, like many businesses, are adopting a "core-competency" philosophy: fleet executives are focusing their attention on what they do best—deliver freight for customers in a timely, cost-effective manner.

The core-competency approach

also means businesses like truckers outsource services such as information management—for a guaranteed fee—because those services are better performed by a company with expertise in that area.

A fleet's relationship with EDS isn't an all-or-nothing arrangement. Service options can be limited to evaluating a client's hardware and software needs. And clients may take advantage of EDS' purchasing power as a high volume retailer. Or it can be a partnership where carrier personnel have direct access to a myriad of information options, via fleets' PCs and modems to EDS' main frame computers at its Dallas, Tex. headquarters and six regional facilities. Or EDS personnel can be stationed at a fleet's facility, taking over every aspect of the customer's information activities. ▢

PAPER PROCESSING COSTS



SOURCE: 1989 M-1 REPORTS (MAJOR MOTOR CARRIERS); TEAM ANALYSIS

According to a 1989 study, document processing and retrieval is responsible for 7% of LTL fleets' total costs and 13% of household goods carriers' costs. By providing imaging equipment, maintenance support and training, EDS claims the cost of operating its system is 20%-30% less than an in-house system.

CHILTON'S

COMMERCIAL TRUCKER JOURNAL

CCTJ

FOR PROFESSIONAL FLEET MANAGERS APRIL 1992

FLEET OPERATIONS ANNUAL

ALSO:
TRUCKING'S STAKE
IN THE HIGHWAY BILL
BUYER'S MARKET
FOR RENTALS



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A leasing company's ability to provide the right equipment on short notice for a short period of time so customers can meet short-term needs, is key to success.

60 TRUCKING'S STAKE IN THE HIGHWAY BILL: ISTE-91 POURS ON THE CHANGES

The Surface Transportation Efficiency Act of 1991 (ISTEA-91) provides higher levels of funding for highway and mass transit programs. Here's a look at ISTEA along with CCJ's annual look at reciprocity agreements, where long combination vehicles can go; primary weight-distance and fuel taxes; and the agencies to contact for information on registration, reciprocity, sizes and weights, taxes and permits.

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AMERICANS WITH DISABILITIES ACT—What's reasonable? At stake are spiraling legal costs for labor litigation and cost avoidance measures to prevent such litigation.

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IS AN APNEIC BEHIND THE WHEEL?—Think all of your drivers are well-rested if they have eight hours sack-time before they're dispatched? Think again.

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ABS: ACCEPTING THE INEVITABLE—The memory of early troubles with ABS for air-braked vehicles is the first line of resistance among many fleet operators I've talked to.

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IN THE NEXT ISSUE

Making a job look easy is a mark of competence. Take someone who makes it look like fun, add a lasting love of maintenance and people, and you're describing Charlie Jaynes.

He's the recently-retired director of purchasing and maintenance for Central Freight Lines, Waco, Texas, and winner of CCF's Fleet Maintenance Executive Career

Leadership Award for 1992.

In next month's cover story, *Charlie Jaynes: Deep in the heart of Texas*, read about how the "Waco Kid" maintained Central's huge fleet of power units and trailers for 30 years, while bringing equipment expenses to record lows. This is the story of Jaynes' professional and personal challenges—and achievements. ▀

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INTERSTATE RECIPROCITY

ISTEA-91 Pours On The Changes

The six-year, \$151 billion Surface Transportation Efficiency Act of 1991 (ISTEA-91) provides higher levels of funding for highway and mass transit programs. It also increases the flexibility of states and local planning organizations when determining how to divide federal dollars between highways, bridges and transit.

Under the legislation, \$119.5 billion is provided for highway construction and repairs, including \$38 billion for the 155,000-mile National Highway System (NHS),

and \$31.5 billion for mass transit construction and expansion.

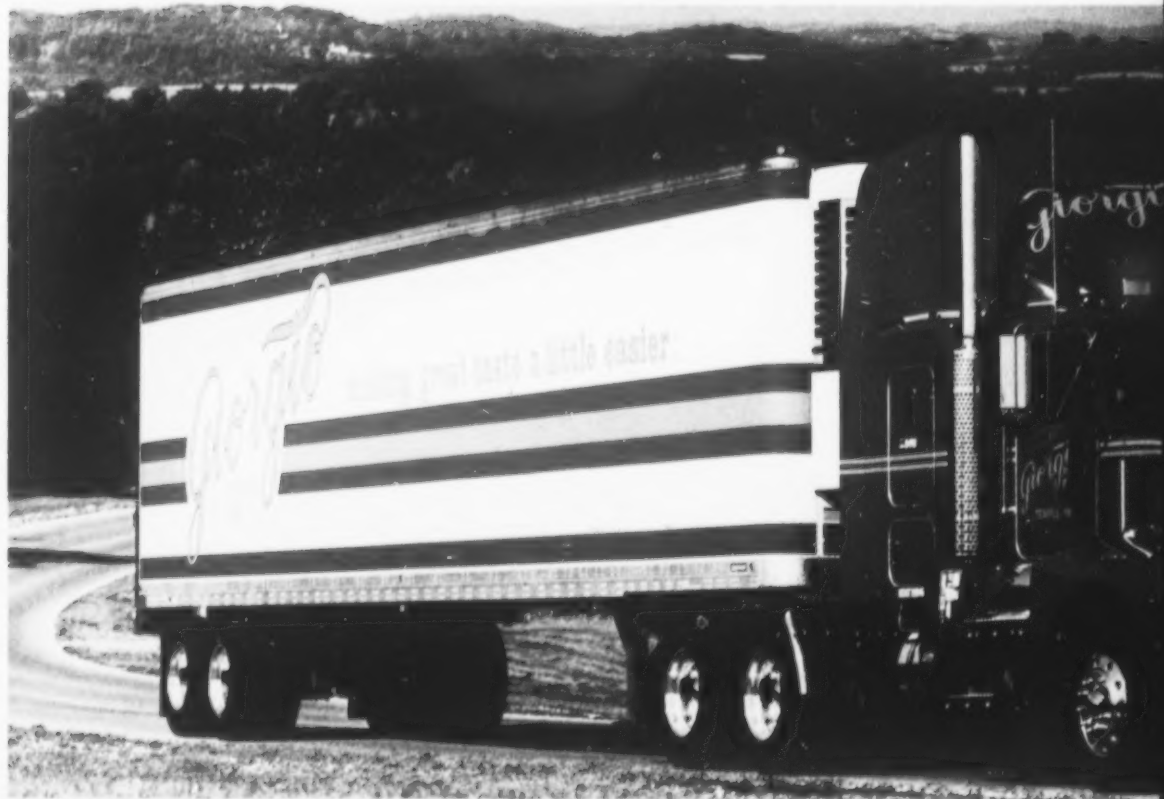
Up to 100% of the NHS funds may be transferred in states which have identified air quality "non-attainment" areas under provisions of the the federal Clean Air Act, if approved by the Secretary of Transportation.

Other states may transfer 50% of their NHS money to other road programs or transit.

"The legislation's goal is to build a decision-making system that is not dominated by the federal bureaucracy. Instead, information

will bubble up from state and local governments," said Rep. Norman Y. Mineta (D-Calif.), in a March speech at a Washington, D.C. symposium sponsored by the Automotive Safety Foundation, an affiliate of the Highway Users Federation. Mineta is a key member of the House Public Works and Transportation Committee.

Previous highway legislation dedicated federal taxes on diesel fuel and gasoline to the Highway Trust Fund for building and repairing roads and bridges.



ISTEA-91 grants state and local officials greater flexibility in deciding how the money is spent, not necessarily a good thing for the trucking industry.

Make no mistake...the battle for funding will be fought largely at the state and local levels.

"Now," say Western Highway Institute (WHI). "large chunks of this revenue will be available for mass transit, urban traffic control, vehicle research, highway safety programs, toll roads and the like, at the whim of state and local governments."

WHI also warns that "flexible funding powers, coupled with Clean Air Act mandates, give metropolitan and regional government organizations great potential for capturing truck tax money for non-highway purposes in 1992."

"All of us that have an interest from the highway side are going to have to be proactive on the state level," says Earl Eisenhart, National Private Truck Council (NPTC) vice president of government affairs. "This presents new challenges for NPTC and other highway-user groups who have traditionally focused most of their efforts on Washington."

"The trend is towards more and more local control," says Lana Batts, senior vice president of government affairs, American Trucking Associations. "In the past, we have had to deal with a two-dimensional chess game. Now we have a three-dimensional chess game at the federal, state and local levels."

The metropolitan planning provisions of ISTEA-91 offer more power to governments via metropolitan planning organizations (MPOs).

MPOs evolved from 1960s federal legislation that allowed local input on questions of urban renewal. The groups are made up of locally elected officials. They have been empowered by ISTEA-91 to make decisions on how transportation funds are spent.

MPOs are responsible for developing, in cooperation with the State and affected transit operators, a long-range transportation plan.

The planning process must now include considerations such as land use, intermodal connectivity,

methods to enhance transit service, and needs identified through the management system.

In communities with a population over 200,000, MPOs will take a lead role in creating the management system to deal with traffic congestion. And MPOs will play supporting roles in developing the other management systems called for by the act, including ones addressing safety, bridges, pavement and intermodal facilities.

Lana Batts said her organization and its 50 state trucking association affiliates will first begin to work with the MPOs in the 22 cities on air quality issues identified as "non-attainment" areas by federal clean air legislation.

"Our first problem is getting to know these people," said Batts. "Our second problem is educating them about what a truck is and what it does."

Batts predicted the problem will be a long, involved process. "There is nothing homogeneous about these groups. And what it is going to take is our individual state associations dealing with MPOs in a manner that reflects the needs of those individual MPOs," Batts continued.

Other key topics of interest to the trucking industry and the MPOs will be developing long range plans for a network of routes connecting to the Interstate Highway System as well as addressing local traffic patterns and productivity issues.

"It's not time for the faint-hearted," declared Janet Oakley, director of transportation, National Association of Regional Council, which represents MPOs.

Continued



INTERSTATE RECIPROCITY

"The new legislation is performance-oriented," said Oakley. "People are going to have to put their heads together. And while it might be contentious, by putting all the issues down on the table and educating the community about the broad picture and not just one little piece of the picture, you have a more informed decision based on the total implications."

ISTEA-91 has several other implications for the trucking industry. It requires states to join the International Registration Plan and the International Fuel Tax Agreement (IFTA) by Sept. 30, 1996. States which participated in the Regional Fuel Tax Agreement as of Jan. 1, 1991, and continue to participate, are not required to join the IFTA.

The act also eliminated bingo stamps, cab cards and decals in the 39 states which participate in those programs, effective Jan. 1, 1994. The legislation also directed the Interstate Commerce Commission (ICC) to establish by June 18, 1993 a base-state system for motor carriers to register their ICC operating authority, provide proof of insurance, and pay all annual fees to a single state.

Only the 39 states that currently

participate in the bingo stamp program can require motor carriers to provide proof of insurance under the new system.

Those states will distribute the collected fees to other participating states in which a carrier's vehicles operate. Fees under this system will be based on the number of vehicles a carrier operates in a state and the number of states the carrier operates in.

States can't charge a fee greater than the amount they charged as of Nov. 15, 1991, and the fee cannot exceed \$10 per vehicle.

The Motor Carrier Safety Assistance Program (MCSAP) was reauthorized. The MCSAP provides federal funds to the states for truck and bus safety activities. By Jan. 1, 1994, states must participate in SAFETYNET, a shared database of driver, vehicle inspection and accident data.

ISTEA-91 increases the maximum length of buses from 40-ft. to 45-ft.

The operation of double and triple trailer combinations with a gross vehicle weight over 80,000-lb is limited to states where they were allowed to be operated on June 1, 1991. ISTEA-91 prohibits states in which LCVs have been allowed to operate from expanding routes or

removing restrictions related to LCV operations after that date.

The Federal Highway Administration (FHWA) will publish a final list of LCV limitations and requirements in the June 1992 Federal Register.

The legislation also requires the FHWA to establish minimum training requirements for LCV operators.

FHWA will issue a final rule on LCV driver training requirements by Dec. 18, 1993.

The agency also will propose a rule by Dec. 18, 1992, on whether training for entry-level truck and bus drivers (other than LCV operators) should be required.

Also by Dec. 18, 1992, the FHWA will issue a final rule on established sanctions and penalties for drivers violating out-of-service orders.

And half of the 5¢ fuel tax increase which became effective in December 1990 has been extended from December 1995 to 1999.

Also, warns WHI, increased state matching requirements will mean pressures for state truck tax increases in the current state legislative sessions. Six western states already have cost allocation studies in the mill.



How To Read The Charts

The following information is a guide to the items on the succeeding maps and charts. Data in this section is compiled from volumes of complex laws and regulations. It is impossible to list all of the details. Final authority rests with the texts of laws and regulations involved. Carriers that have questions or seek additional information can find the telephone numbers of the licensing and registration authorities in each state at the end of this section.

Commercial Vehicle Safety Alliance (CVSA) is a truck safety group representing 48 states (only Hawaii and South Dakota are not members), the country of Mexico and 12 Canadian provinces and territories. CVSA provides a framework so participants can achieve uniformity, compatibility and reciprocity of standardized heavy vehicle roadside and on-site safety inspection procedures and out-of-service criteria. CVSA issues a quarterly, color-coded decal for commercial vehicles that pass random inspection.

International Registration Plan (IRP), a base-State agreement for the registration of trucks and buses operating in different States, has 45 member-states. A member's truck can travel in all member states and the Canadian province of Alberta with one license plate and one IRP cab card. The motor carrier pays a registration fee to its base (or home) state. The base state sends a portion of that fee to IRP states where the member vehicle or vehicles will travel in the coming year.

The Intermodal Surface Transportation Efficiency Act of 1991

(ISTEA-91) requires all states to join the IRP by Sept. 30, 1996. To help with technical assistance, training and the equipment needed to participate in the IRP, ISTEA-91 authorizes \$30 million in grants to the States. It also authorizes \$6 million to fund a group of State and local government officials which must report recommendations on improving the IRP and IFTA in two years.

International Fuel Tax Agreement (IFTA), which covers 20 states, and the **Regional Fuel Tax Agreement (RFTA)**, which covers three states, are base state fuel use tax agreements modeled after the IRP. Under ISTEA-91 all states must join IFTA by Sept. 30, 1996.

Under IFTA and RFTA, the motor carrier files with their base state in order to complete tax registration, reporting and payment for all participating states. The base state issues a license, provides one decal, processes and verifies tax reports, receives license fees and tax payments, and distributes tax payments to appropriate member states.

Fuel Taxes: State fuel taxes increased in 11 states in 1991, up from six states in 1990. This year, 18 states are expected to consider increasing highway revenues to take advantage of increased federal funding available under ISTEA-91. To take advantage of the new funding, states must raise 20% of project costs. The Federal share for most programs is 80%. Most of the state funds are raised from taxes on gasoline and diesel fuel. Federal funds come primarily from the 20¢ tax on diesel fuel and the 14¢ tax on gasoline.

Third Structure Taxes are ton-mile or axle-mile taxes charged by six states. Registration fees and fuel taxes are the first and second levels of the structure.

Long Combination Vehicles (LCVs): ISTEA-91 restrict operations of double and triple trailer combinations with gross weights in excess of 80,000-lb to the States in which they were operating on June 1, 1991. It also prohibits the expansion of routes or the removal of operating restrictions after that date. States were required to submit information on LCV limitations and requirements to the FHWA by Feb. 18. A final list of these state laws and highways will be published in the Federal Register in June.

ISTEA-91 also requires FHWA to study the operation and safety of longer combination vehicles.

53-ft Trailers are allowed by 44 states on Interstates and designated highways, and by 32 states on state and nondesignated highways. Most states have an axle-spacing or a kingpin requirement to minimize "swing out" on the rear end of the trailer.

Reciprocity Agreements



States in International Registration Plan

RFTA Regional Fuel Tax Agreement

IFTA International Fuel Tax Agreement

CVSA All states belong to the Commercial Vehicle Safety Alliance except Hawaii and South Dakota

What you see are the states which are members of the major reciprocity agreements. The map is designed to give you a starting point from which to check out the requirements of each state through which your vehicles will pass.

What you don't see is the minute detail of interstate reciprocity agreements, many involving several pages of text. Nor does the chart cover Public Utility Commission (PUC) agreements involving for-hire carriers.

Hence, you are urged to seek further details either from your associations or by contacting the appropriate state authorities. Addresses and telephone numbers are listed. If you have any doubts, this should be done in advance of the trip.

While every precaution has been taken to assure accuracy, correctness is not guaranteed, and the publishers waive all responsibility for any errors or omissions.

State	Agreements				Taxes				Third Structure Tax	LCVs Allowed	53-ft Trailers Allowed	
	CVSA	IRP	IFTA	RFTA	c gal Gas	c gal Diesel	c gal Gasohol	c gal LPS			I&DH**	S&NH***
ALA	x	x			13	14	13	0			x	x
AK	x				8	8	0	0		T; TD; RMD		
ARIZ	x	x	x		18	18	18	18	x	T; TD; RMD	x	x
ARK	x	x	x		18.5	18.5	18.5	16.5		RMD*	x	x
CALIF	x	x			16	16	16	6		T; TD; RMD	x	x
COLO	x	x	x		22	20.5	22	20.5				
CONN	x	x			26	18	24	24			x	x
DEL	x				19	19	19	19				
D.C.	x				18	18	18	18		TD; RMD	x	x
FLA	x	x			11.6	18.7	11.6	11.6			x	
GA	x	x			12	12	12	12				
HI					16	16	16	7	x	T; TD; RMD	xP	x
IDA	x	x	x		21	21	17	15.2			x	x
ILL	x	x			19	21.5	19	19		T; TD; RMD	x	x
IND	x	x	x		15	16	15	16			x	x
IA	x	x	x		20	22.5	19	20		T; TD; RMD	x	x
KANS	x	x	x		17	19	16	16	x		x	x
KY	x	x			15	12	15	15		RMD**	x	
LA	x	x			20	20	20	20			xP	
ME	x	x		x	19	20	19	18				
MD	x	x			18.5	18.5	18.5	18.5		TD	x	
MASS	x	x			21	21	21	9.4			x	
MICH	x	x			15	15	15	15			x	x
MINN	x	x	x		20	20	20	20			x	x
MISS	x	x			18	18	18	17		T; TD; RMD	x	x
MO	x	x	x		13	13	13	13		T; TD; RMD	x	x
MONT	x	x	x		20	20	20	0		T; TD; RMD	x	x
NEB	x	x	x		23.8	23.8	23.8	23.8		T; TD; RMD	x	x
NEV	x	x	x		23	24.5	23	20.5			x	
N.H.	x	x		x	18	18	18	18			x	
N.J.	x				10.5	13.5	10.5	5.25			x	x
N.M.	x	x			16	16	13.2	16	x	TD; RMD	x	
N.Y.	x	x			8	10	8	8	x		x	
N.C.	x	x	x		22.3	22.3	22.3	22.3		T; TD; RMD	x	x
N.DAK	x	x	x		17	17	17	17		T; TD; RMD	x	x
OHIO	x	x			21	21	21	18		T; TD; RMD	x	x
OKLA	x	x	x		16	13	16	16	x	T; RMD	x	xP
ORE	x	x			22	22	17	22			x	x
PA	x	x			12	12	12	12				
R.I.	x				26	26	26	26			x	
S.C.	x	x			16	16	16	16		T; TD; RMD	x	x
S.DAK		x	x		18	18	16	16			x	x
TENN	x	x			20	17	20	14			x	x
TEX	x	x			20	20	20	15		T; TD; RMD	xP	xP
UTAH	x	x	x		19	19	19	19			x	
VT	x	x		x	16	17	16	0			x	x
VA	x	x			17.5	16	17.5	16		RMD	xP	xP
WASH	x	x	x		23	23	20.7	20.35			x	x
W.VA.	x	x			20.35	20.35	20.35	20.5			x	x
WISC		x	x		22.2	22.2	22.2	22.2		T; RMD	x	x
WYO	x	x	x		9	9	5	0				

* -Over all 65 ft length; ** two 30 ft units and a cargo space of 75 ft; *** P Permit Needed
I&DH- Interstate & Designated Hwys; S&NH State & Non-designated Hwys

Taxes

PRIMARY WEIGHT-DISTANCE & FUEL TAXES IN CENTS-PER-GALLON GASOLINE • DIESEL • GASOHOL • LPG



Since taxes are subject to revision, contact the appropriate state office for current information.

According to The American Trucking Associations, third structure tax rates charged by states include:

- Arizona:** Motor Carrier Tax begins at 1.319¢ per mile for 26,000-lb commercial vehicles and increases in 5,000-lb increments to 8.0¢ per mile for an 80,000-lb unit. With prior approval by the state, vehicles customarily used for one-way hauls, which run at least 45% of their miles empty, pay at 70% of these rates.
- Idaho:** Use Fee for vehicles and combinations over 60,000-lb GVW begins at 3.005¢ per mile and increases in one-ton increments to 4.49¢ per mile for an 80,000-lb unit. Vehicles over 80,000-lb pay 4.49¢ per mile plus 0.21¢ a mile per ton or fraction thereof over 80,000-lb.
- Kentucky:** Weight-distance tax for

vehicles and combinations with a maximum registered GVW over 59,999-lb and under 80,000-lb is charged at 4¢ per mile.

- New Mexico:** Weight-distance tax for vehicles and combinations over 26,001-lb GVW begins at 1.975¢ per mile and increases in one-ton increments to 3.168¢ per mile for vehicles 78,001-lb and over. With prior approval by the state, vehicles customarily used for one-way hauls, which run at least 45% of their miles empty, pay at two-thirds of these rates.

- New York:** Highway Use Tax applies to: power units and combinations with GVW over 18,000-lb; trucks with an unladen weight over 8,000-lb; and tractors with an unladen weight over 4,000-lb. The tax calculated according to a vehicle's gross weight begins at 0.6¢ a mile for vehicles over 18,000-lb and increases in one-ton increments to 3 1/2¢ per mile for 76,000-lb vehicles.

Vehicles over 76,000-lb pay an additional 0.2¢ per mile per additional ton. (The tax may also be calculated according to a vehicle's empty weight.) A supplemental tax, in the amount equal to the applicable Highway Use Tax, is also imposed on all public highways exclusive of the toll portions of the New York State Thruway.

- Oregon:** Weight-Mile tax applies to commercial vehicles over 26,000-lb GVW. Vehicles are taxed according to the maximum combined weight declared for purposes of the tax and the number of taxable miles traveled. The tax is 4.45¢ per mile for vehicles over 26,000-lb increasing in one-ton increments to 14.55¢ per mile for 80,000-lb vehicles. The tax includes 16¢ per gal. diesel fuel tax. Vehicles over 80,000-lb are subject to a Road Use Assessment Fee determined by gross weight and number of axles.

State Agencies

Contact these state agencies for information on registration, reciprocity, sizes and weights, taxes and permits.

ALABAMA

Registration: 205-242-9000
Motor Fuel Division
205-242-9608
Oversize/Overweight
205-834-1092

ALASKA

Registration: 907-269-5571
Motor Fuel Division
907-465-2322
Oversize/Overweight
907-345-7636

ARIZONA

One Stop Shopping
602-255-6775

ARKANSAS

Registration, Taxes:
501-682-4800
Oversize/Overweight
501-569-2381

CALIFORNIA

Registration: 916-732-7075
Motor Fuel Division
916-322-2010
Taxes
916-369-0500
Oversize/Overweight
916-445-2172

COLORADO

One Stop Shopping
303-534-5602
Taxes
303-866-3324

CONNECTICUT

Registration: 203-566-2394
Motor Fuel Division
203-297-5780
Oversize/Overweight
203-566-4010

DELAWARE

Registration: 302-739-4459
Motor Fuel Division
302-739-4538
Oversize/Overweight
302-739-4374

DISTRICT OF COLUMBIA

Registration: 202-727-6694
Audit Division
202-727-6566
Oversize/Overweight
202-727-7049

FLORIDA

One Stop Shopping
904-488-6921
Oversize/Overweight
904-488-4961

GEORGIA

Registration: 404-656-4145
Motor Fuel Division
404-656-4050
Oversize/Overweight
404-656-5428

HAWAII

Registration: 808-941-2255
Motor Fuel Division
808-548-3892
Oversize/Overweight
808-548-5821

IDAHO

Registration: 208-334-8611
Motor Fuel Division
208-334-7706
Oversize/Overweight
208-334-8420

ILLINOIS

Registration: 217-782-4815
Motor Fuel Division
217-785-1397
Oversize/Overweight
217-782-6271

INDIANA

One Stop Shopping
317-232-2791

IOWA

One Stop Shopping
515-237-3264

KANSAS

One Stop Shopping
913-272-8192

KENTUCKY

One Stop Shopping
502-564-4540

LOUISIANA

Registration: 504-925-6270
Motor Fuel Division
504-925-7656
Oversize/Overweight
504-343-2345

MAINE

Registration, Licensing
207-626-8600
Motor Fuel Division
207-289-3851
Oversize/Overweight
207-626-8630

MARYLAND

Registration: 301-787-2971
Fuel Taxes
Motor Vehicle Fuel Tax
301-974-3134
Oversize/Overweight
301-333-1597

MASSACHUSETTS

Registration: 617-727-3559
Motor Fuel Division
617-727-4373
Oversize/Overweight
617-973-7796

MICHIGAN

One Stop Shopping
517-322-1166

MINNESOTA

One Stop Shopping
612-296-2138
Fuel-Trip Permit Only
612-296-7935
Oversize/Overweight Permits
612-296-6441

MISSISSIPPI

Registration: 601-359-1248
Motor Fuel Division
601-359-1261
Oversize/Overweight
601-359-1148

MISSOURI

Registration, Permits, Fuel
314-751-2611
Oversize/Overweight
800-877-8499

MONTANA

Registration, Permits &
Oversize/Overweight
406-444-6130
Motor Fuel Division
406-444-3474

NEBRASKA

Registration: 402-471-3897
Motor Fuel Division
402-471-2971
Oversize/Overweight
402-479-4775

NEVADA

Registration, Motor Fuel
702-687-5340
Oversize/Overweight
702-687-5410

NEW HAMPSHIRE

Registration & Fuel Tax
603-271-2311
Oversize/Overweight
603-271-2691

NEW JERSEY

One Stop Shopping
609-588-360

NEW MEXICO

Registration: 505-827-0392
Motor Fuel Division
505-827-4519
Oversize/Overweight
505-827-0367

NEW YORK

Registration: 518-474-0871
Motor Fuel Division
518-457-3652
Oversize/Overweight
518-457-1155

NORTH CAROLINA

One Stop Shopping
919-733-0671

NORTH DAKOTA

Registration: 701-224-2725
Non-IFTA: 701-224-3239
IFTA: 701-224-2725
Oversize/Overweight
701-224-2621

OHIO

Registration: 614-752-7500
Motor Fuel Division
614-466-3921
Oversize/Overweight
614-275-2800

OKLAHOMA

One Stop Shopping
405-521-3036
Oversize/Overweight
405-425-2390

OREGON

Registration: 503-378-6699
Weight Distance Tax Division
503-378-6699
Oversize/Overweight
503-378-3568

PENNSYLVANIA

Registration: 717-783-6095
Motor Fuel Taxes
717-783-2518
Oversize/Overweight
717-787-4680

RHODE ISLAND

Registration & Oversize/Overweight
401-277-2986

SOUTH CAROLINA

Registration: 803-737-6620
Motor Fuel Division
803-737-4872
Oversize/Overweight
803-737-1279

SOUTH DAKOTA

Multi-State Licensing
605-773-3501
Motor Fuel Division
605-773-3541
Oversize/Overweight
605-698-3925

TENNESSEE

Registration: 615-741-1786
Motor Fuel Division
615-741-3394
Oversize/Overweight
615-741-3821

TEXAS

Registration: 512-465-7686
Oversize/Overweight
512-465-1700

UTAH

Registration & Fuel Permits
801-538-8390
Oversize/Overweight
801-965-4508

VERMONT

One Stop Shopping
802-828-2070

VIRGINIA

One Stop Shopping
804-786-3621

WASHINGTON

Registration & Fuel
206-753-6993
Oversize/Overweight
206-459-6715

WEST VIRGINIA

Registration: 304-348-3900
Motor Vehicle Division
304-348-3333
Oversize/Overweight
304-348-3643

WISCONSIN

One Stop Shopping
608-266-9900

WYOMING

Registration, Fuel &
Oversize/Overweight
307-777-4437

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CHILTON'S **COMMERCIAL CARRIER JOURNAL**

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**NTSB's Bad News
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Hazardous Shop Waste

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VOLUME 149 NUMBER 5 MAY 1992

FEATURES

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Making a job look easy is one mark of competence. Take someone who makes it look like fun, add a lasting love of maintenance, of people, of God and Texas, and you're describing Charlie Jaynes. He's recently-retired director of purchasing and maintenance for Central Freight Lines, and CCJ's award winner.

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4 COMMERCIAL CARRIER JOURNAL May 1992

HONOR AND GRACE

This issue of CCJ is dedicated to Don Dawson, who died at home earlier this year. As vice president of maintenance for Roadway Express, he was our 1991 Career Leadership Award recipient.

Widely regarded as one of the most innovative and inspirational leaders in fleet maintenance, the industry will be a long time sorting out the ultimate scope of Don's

legacy to trucking, his profession and, especially, his many friends.

We will continue to celebrate his creative intellect, achievements and total command of his profession. We will recall with a smile his eager, self-deprecating wit.

And we will strive to emulate the honor and grace he maintained with so many for so long.

He touched us all. □

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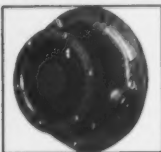


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36 COMMERCIAL CARRIER JOURNAL May 1992

BUSINESS SIDE

Banker describes successful fleets

Successful truckload carriers fall into one of four categories, claims Thomas J. O'Bryant, vice president and manager of First National Bank of Chicago's transportation division.

In a presentation at the Interstate Truckload Carrier Conference's recent annual meeting in Nashville, Tenn., O'Bryant described the four types of successful companies as:

- **Gorillas**—large, well-capitalized national fleets which have access to public and private capital markets for debt and equity funds.

- **Gazelles**—niche players who know who they are and how to compete with the "gorillas," which often is to avoid competing directly against them.

Gazelles are usually privately owned, generate \$15 to \$75 million in revenues, and have a low amount of debt compared to equity.

- **Fleets in limbo**—although these carriers are unsure of who they are, they've decided market share growth is imperative. And that growth has been accomplished via debt capital, not equity capital.

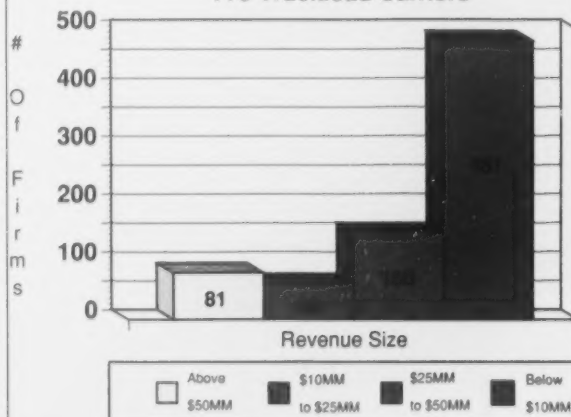
As a result, they're vulnerable to drastic changes in the operating environment. And although they're unable to exercise control with their clients like the "gorillas" can, they try to compete head-to-head with those fleets.

Since some of these companies have good management and they're still in transition toward their ultimate position in the industry, they will survive.

- **Free agents**—smaller fleets which can continue to be successful if they relentlessly pursue their goals and remain conservatively financed.

Continued

Revenue Categories of the Nation's 775 Truckload Carriers *



* Fleets with a positive net worth, based on 1990 ATA data.



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38 COMMERCIAL CARRIER JOURNAL May 1992

BUSINESS SIDE

Successful fleets

Continued

Which fleets succeed

O'Bryant says successful TL carriers have these nine characteristics:

1. They're religious about service and quality.
2. They know who they are and are successful about conveying that idea to their employees. And, in turn, their workers consistently convey their company's self-image and mission to the market.
3. They keep "raising the bar" in service and financial performance.
4. They constantly reinvest in productive technology and ideas. And they do so at a faster pace than their primary competition.
5. They are relentless in their pursuit of being low-cost. However, when it means improved customer service or line-haul efficiency, they quickly switch to a return on investment philosophy.
6. They make a great effort to determine exactly what their customers really want.
7. They only venture into a new business area after they thoroughly studied it and believe they know the boundaries of upside and downside potential. Thus, they know the point where they'll move to cut losses if they occur and do so quickly.
8. They constantly communicate with financial institutions in order to have several sources of capital.
9. They have "informed" faith, not "blind" faith. □

J.B. Hunt drivers testing new IBM on-board computers

A new IBM on-board computer system, developed in conjunction with J.B. Hunt Transport Services, is being field-tested by the Lowell, Ark.-based truckload carrier.

In addition to two-way messaging to provide actual arrival and departure times, shipment status reports and automated check calls, the system also features: capturing signatures for electronic forms; a database for permits; weather info; monitoring speed and recording engine information.

The system includes a "ruggedized, puddle-proof" portable terminal that can operate in temperatures ranging from -40°F to 185°F. The 5-lb, 11- x 8.75-in. terminal is equipped with an i386 processor with no disk drives or fans that would wear out, and a VGA touch screen instead of a keyboard.

It also has a docking station to charge the terminal, provide communication links and secure the terminal on board.

Ultimately, the system will be available to all fleets. □

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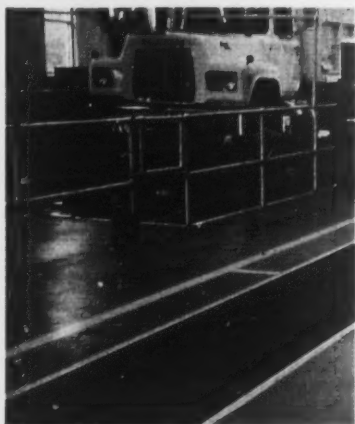
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55 TOP 100

The leading for-hire fleets' 1991 financial performance may lend credence to the adage: "no pain, no gain." That's because, as a group, the Top 100 carriers increased their aggregate post-tax income by 4% in a recessionary economy.

75 TRENDS & STATISTICS

There was no cause to celebrate 1991 equipment sales. And while most suppliers experienced buoyant second quarter sales this year, few have the confidence to revise upward their conservative business plans for 1992.

87 FACING THE '90s WITH TECHNOLOGY OF THE '50s

Why is there an LCV freeze in a law entitled "The Intermodal Surface Transportation Efficiency Act"? Byron Geuy, Executive Director, Western Highway Institute, would like to know.

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CONTROVERSY TO COMPLACENCY—NHTSA issues proposed rulemaking on anti-lock braking systems.

37 BUSINESS SIDE

THEY'RE PUMPED UP ABOUT FDIS—Computerized fuel purchase system gives complete control of fuel network.

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HAZMAT TRAINING REQUIREMENTS—RSPA rules that all interstate carriers which transport hazardous materials must conduct appropriate training/testing of hazmat employees.

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BRAKES CHECKED—WHILE U DRIVE—Drive-over brake balance tester for heavy trucks will be introduced this Summer.

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IN THE NEXT ISSUE

CCJ will try to clarify a confusingly revised federal rule—effective in October—on trailer air brakes.

The revision allows air for spring brakes to be taken directly from a tractor's supply line, not its dedicated air reservoir.

Some fear that safety will suffer because it will be legal to spec trailer air brake plumbing that permits unlimited operation with a

leaky system. This story, by Sr. Technical Editor, Rich Cross, entitled, "What NHTSA's New Brake Rule Means To You," offers rule interpretations and spec'ing options. Cross uses diagrams to explain how suppliers have revised trailer air brake system plumbing schemes to compensate for the elimination of the second air reservoir. □

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TOP 100

THE SECOND 100

By **PARRY DESMOND**, Executive Editor



TOP 100 fleets found recipe for survival

Although they had to cope with some bitter ingredients from the 1991 U.S. economy, many of the nation's leading for-hire carriers knew how to handle the heat.

Just as it takes more than flour to bake a cake, strong revenues aren't the sole ingredient in the rankings of the nation's *Top 100* for-hire carriers.

That's because the *Top 100* fleets' rankings also were affected by many bitter ingredients from the 1991 U.S. economy.

They include:

- industrial production, down 1.9%;
- 200,000 fewer housing starts—one reason why the *Top 100*'s household goods carriers' operating ratio (OR) averaged 98.6 and their net profit margin was 0.27%;

- 1.1 million fewer cars sold, resulting in *Top 100* car carriers having an average 100.3 OR for the second straight year and a -1.28% net loss in 1991;

- a 6.7% unemployment rate;
- a \$201.2 billion increase in the federal deficit;

- pre-tax corporate profits off by \$22.9 billion.

Those bitter ingredients were partially neutralized by the following sweeteners:

- Although surcharges didn't cover surging fuel prices in the first quarter of 1991, the per-barrel price U.S. refiners paid overall for

Continued

Fleets whose annual revenues improved the most

Fleet, City, State	Revenue Percent Change
Missouri Nebraska Express (MNX), St. Joseph, Mo.....	45.1%
Direct Transit, North Sioux City, S.D.....	44.4%
Arkansas Freightways, Harrison, Ark.....	38.8%
U.S. Xpress, Chattanooga, Tenn.....	35.0%
J.B. Hunt Transport, Lowell, Ark.....	26.2%
C.R. England & Sons, Salt Lake City Ut.....	25.7%
M.S. Carriers, Memphis, Tenn.....	23.5%
Swift Transportation, Phoenix, Ariz.....	21.8%
Ryder Distribution Resources, Miami, Fla.....	20.5%
New Prime, Springfield, Mo.....	20.4%
Schneider National Carriers, Green Bay, Wisc.....	20.1%
Heartland Express, Coralville, Ia.....	17.5%
Stevens Transport, Mesquite, Tex.....	17.2%
Contract Freighters Inc., Joplin, Mo.....	16.8%
Crete Carrier Corp., Lincoln, Neb.....	16.1%

Carriers with for-hire authority

Year	Class I (Over \$5 million)	Class II (\$1-\$5 million)	Class III (Under \$1 million)	Total
1991	863	1,148	44,174	46,185
1990	870	1,169	42,109	44,414
1987	856	1,266	35,505	38,338
1984	1,088	1,554	27,370	30,481
1981	1,031	2,293	18,563	22,270

Less-Than-Truckload Common Carriers of General Freight

Fleet Name, City & State	Gross Revenue	Total Operating Expenses	Net Operating Income	Interest Expense	Net Income	Operating Ratio	Profit Margin %	Salaries, Wages & Fringes
LTL GENERAL FREIGHT COMMON CARRIERS								
AAA COOPER TRANSPORTATION, DOTHAN, AL	\$166,887	\$152,064	\$14,823	\$5,970	\$7,573	91.1	4.54	\$97,860
ABF FREIGHT SYSTEM, INC., FORT SMITH, AR	783,024	754,125	28,899	7,675	(2,949)	96.3	-0.38	515,941
A-P-A TRANSPORT CORP., NORTH BERGEN, NJ	138,043	130,279	7,764	2,899	5,945	94.4	4.31	87,451
ADVANCE TRANSPORTATION CO., MILWAUKEE, WI	119,980	117,682	2,299	2,092	110	98.1	0.09	73,748
ANR FREIGHT SYSTEM, INC., DENVER, CO	123,442	154,712	(31,270)	1,107	(25,152)	125.3	-20.38	95,933
ARKANSAS FREIGHTWAYS CORP., HARRISON, AR								
ARIZONA FREIGHTWAYS CORP., HARRISON, AR	196,465	184,015	14,449	2,631	7,870	92.7	3.97	94,312
AVERITT EXPRESS, INC., COOKEVILLE, TN	164,006	153,131	10,876	2,323	5,214	93.4	3.18	82,094
CAROLINA FREIGHT CARRIERS, CHERRYVILLE, NC	583,592	575,643	7,949	3,721	650	98.6	0.11	395,199
CENTRAL FREIGHT LINES, INC., WACO, TX	219,422	214,007	5,416	2,168	2,072	97.5	0.94	150,688
CENTRAL TRANSPORT, INC., WARREN, MI	302,328	297,608	4,721	2,886	6,727	98.4	2.23	53,766
CHURCHILL TRUCK LINES, INC., CHILLICOTHE, MO								
CON-WAY TRANSPORTATION SVCS., PORTLAND, OR	164,994	166,065	(1,071)	299	(475)	100.6	-0.29	103,227
CONSOLIDATED FREIGHTWAYS CORP., PORTLAND, OR	534,496	493,838	40,658	3,135	22,469	92.4	4.20	320,356
ESTES EXPRESS LINES, RICHMOND, VA	2,045,250	1,998,964	46,286	15,849	19,534	97.7	0.96	1,342,150
G.I. TRUCKING COMPANY, LA MIRADA, CA	111,477	97,496	13,982	206	8,067	87.5	7.24	67,090
HYMAN FREIGHTWAYS, INC., ST. PAUL, MN	103,334	100,570	2,764	2,265	127	97.3	0.12	45,220
MERCHANTS FAST MOTOR LINES, ABILENE, TX	104,260	103,233	1,027	635	218	99.0	0.21	52,873
NEW PENN MOTOR EXPRESS, INC., LEBANON, PA	105,286	104,501	785	29	(29)	99.3	-0.03	62,539
NORTHWEST TRPT. SERVICE, COMMERCE CITY, CO	129,618	103,337	26,281	585	20,543	79.7	15.85	72,440
OLD DOMINION FREIGHT LINES, HIGH POINT, NC	258,844	245,711	13,133	18	6,233	94.9	2.41	155,707
OVERNITE TRANSPORTATION CO., RICHMOND, VA	155,864	142,561	13,303	2,971	163	91.5	0.10	74,404
PRESTON TRUCKING COMPANY, INC., PRESTON, MD	799,769	759,816	39,953	96	33,531	95.0	4.19	479,829
ROADWAY EXPRESS, INC., AKRON, OH	414,138	417,345	(3,207)	6,408	(5,954)	100.8	-1.44	290,639
SAIA MOTOR FREIGHT LINE, INC., HOUMA, LA	2,041,314	1,942,679	98,635	2,833	64,319	95.2	3.15	1,339,699
ST. JOHNSBURY TRUCKING CO., HOLLISTON, MA	109,402	97,482	11,920	3,476	4,689	89.1	4.29	55,489
SOUTHEASTERN FREIGHT LINES, COLUMBIA, SC	304,721	306,250	(1,529)	5,316	(6,581)	100.5	-2.16	221,014
SPARTAN EXPRESS, INC., GREER, SC	158,927	146,737	12,190	552	11,700	92.3	7.36	95,250
TNT HOLLAND MOTOR EXPRESS, HOLLAND, MI	89,488	95,725	(6,237)	2,050	(5,504)	107.0	-6.15	47,293
TNT RED STAR EXPRESS, INC., AUBURN, NY	283,459	258,043	25,417	0	15,221	91.0	5.37	184,392
TRANSUS, INC., ATLANTA, GA	170,563	170,682	(119)	219	(283)	100.1	-0.17	123,902
UNITED PARCEL SERVICE, INC. (OH), ATLANTA, GA	81,208	82,600	(1,392)	0	(963)	101.7	-1.19	40,735
UNITED PARCEL SERVICE, INC. (NY), ATLANTA, GA	8,524,001	7,915,534	608,467	192	407,277	92.9	4.78	5,490,067
VIKING FREIGHT SYSTEM, INC., SAN JOSE, CA	3,198,740	3,103,164	95,577	184	58,245	97.0	1.82	2,168,898
WATKINS MOTOR LINES, INC., LAKELAND, FL	233,754	219,120	14,634	1,819	8,388	93.7	3.59	145,254
WILLIG FREIGHT LINES, SAN FRANCISCO, CA	267,445	252,226	15,219	410	6,202	94.3	2.32	110,697
YELLOW FREIGHT SYSTEM, OVERLAND PARK, KS	75,189	75,124	65	2,548	(1,804)	99.9	-2.40	51,238
TOTAL: LTL GENERAL FREIGHT	2,323,268	2,298,364	24,904	9,839	8,804	98.9	0.38	1,580,568
TOTAL: LTL GENERAL FREIGHT	\$25,587,998	\$24,430,433	\$1,157,571	\$95,406	\$682,197	95.5	2.67	\$16,367,962

(all dollar amounts in thousands)

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								Trucks Owned	Tractors Owned	Trailers Owned	Leased Vehicles
\$7,468	\$9,005	\$8,031	\$5,736	\$3,694	\$2,743	\$11,251	\$6,276	65	881	1,907	75
35,180	31,282	61,370	31,091	16,041	11,889	33,165	18,166	102	3,528	12,866	225
3,868	6,799	13,376	3,302	4,076	3,341	6,713	1,353	369	527	1,535	0
4,555	6,776	5,875	4,453	3,535	1,413	2,883	14,444	12	463	1,549	245
6,180	6,415	14,243	5,539	3,307	3,891	3,401	15,803	10	660	3,098	202
8,110	3,974	39,456	6,826	7,010	3,484	13,790	7,053	41	1,294	3,871	299
12,587	5,646	16,141	3,407	2,722	3,091	9,554	17,889	57	287	2,301	594
19,425	26,336	24,751	18,997	14,148	8,253	30,986	37,548	92	3,121	9,971	0
9,196	11,199	10,737	9,484	5,435	3,157	11,914	2,197	512	1,672	4,199	0
0	1,403	10,745	1,789	5,442	1,883	973	221,607	0	0	0	730
7,355	12,389	6,617	6,176	3,543	2,415	5,055	19,288	24	999	2,341	0
19,793	23,063	48,091	21,159	15,618	11,548	26,706	7,504	46	2,678	6,953	563
79,333	109,547	131,913	74,325	55,193	28,069	80,449	97,985	104	7,166	26,895	1,313
5,598	4,815	4,741	4,742	2,741	1,955	5,382	432	10	908	2,277	0
1,598	3,675	10,666	2,821	2,782	1,332	3,823	28,653	22	419	1,343	46
3,460	4,338	28,521	2,778	1,724	1,470	2,723	5,344	25	287	2,133	137
4,318	5,610	15,142	4,291	2,646	1,672	458	7,825	0	0	1,948	1,035
3,374	6,617	7,048	4,110	2,651	1,590	4,597	910	54	510	1,144	0
10,937	14,225	30,696	9,669	4,528	2,406	579	16,964	57	1,215	5,335	238
7,136	7,730	11,685	4,790	6,415	2,891	6,821	20,689	21	728	3,157	110
41,154	42,664	59,598	39,574	27,634	13,424	30,257	25,682	121	5,205	14,318	0
15,918	25,455	23,053	15,261	8,760	5,686	14,240	18,333	40	2,173	6,119	75
71,436	110,838	129,502	68,324	37,094	29,214	96,139	60,433	282	9,184	29,035	0
4,544	4,488	5,253	4,594	3,836	1,724	6,525	11,029	10	699	1,458	0
10,747	15,003	15,753	9,553	7,766	5,418	9,172	11,824	118	1,214	3,437	0
6,176	8,521	11,118	5,097	3,058	2,651	8,214	6,652	44	991	2,526	0
3,295	5,918	7,135	2,711	3,246	2,230	4,306	19,591	30	413	1,676	0
14,326	15,497	7,865	11,451	4,054	2,647	9,121	8,690	0	1,174	2,012	0
5,511	9,993	9,375	5,688	2,964	2,856	5,567	4,826	133	690	1,364	103
2,919	5,329	4,354	2,203	3,074	1,822	2,043	20,121	25	541	1,267	178
143,269	363,585	872,751	125,738	127,765	105,142	294,962	392,255	44,286	5,510	35,889	0
45,569	121,715	367,042	42,062	64,533	49,901	116,420	127,024	18,133	2,230	1,936	0
8,807	7,837	19,700	9,768	4,688	3,923	15,585	3,558	63	1,327	4,432	75
6,268	12,907	26,397	5,610	7,940	5,601	4,333	72,473	0	12	3,843	1,222
3,418	4,758	3,859	3,994	1,622	888	4,829	518	100	549	1,337	0
<u>91,171</u>	<u>133,120</u>	<u>148,748</u>	<u>84,373</u>	<u>56,497</u>	<u>31,607</u>	<u>124,788</u>	<u>47,492</u>	<u>298</u>	<u>9,853</u>	<u>34,002</u>	<u>13</u>
\$723,999	\$1,188,472	\$2,211,348	\$661,486	\$527,782	\$363,229	\$1,007,724	\$1,378,431	65,306	69,108	239,474	7,478

Tons Carried	Intercity Mileage				Average Haul (Miles)	Linehaul Cost/Mile	Tons Carried		Shipments		Average Load (in Tons)
	Total Mileage	Owned Vehicles	Leased Vehicles	Intermodal Mileage			Tons LTL	Tons TL	LTL	TL	
1,060	45,887	44,179	0	1,708	343	\$0.928	872	188	2,064	21	7.6
3,038	243,907	236,013	105	7,789	1,174	1.147	2,384	654	4,793	78	14.0
749	13,843	13,843	0	0	248	1.677	605	144	1,538	14	13.4
1,127	32,792	20,158	12,635	0	297	1.228	621	506	1,118	42	10.2
1,152	39,843	27,276	8,133	4,434	404	NA	548	604	1,056	43	10.4
1,238	57,608	52,661	4,497	450	457	0.926	1,033	205	2,150	29	9.8
1,589	76,929	27,266	49,663	0	NA	0.727	889	700	1,669	59	NA
2,552	161,946	134,677	12,470	29,739	678	1.116	2,052	501	4,733	58	11.2
2,683	56,483	55,736	0	747	212	1.061	1,162	1,522	2,907	105	9.9
4,454	81,048	14	81,034	0	154	NA	2,727	1,727	4,671	175	8.4
853	52,432	42,608	6,840	2,983	668	1.157	669	184	1,252	22	10.1
3,369	105,560	81,773	23,787	0	283	1.470	2,755	614	5,807	76	9.0
7,040	625,378	485,958	97,190	42,230	1,390	1.286	5,484	1,557	12,722	174	14.5
986	26,783	26,783	0	0	190	1.002	680	306	1,318	30	7.0
476	36,164	5,831	16,710	13,624	1,018	NA	400	76	1,003	9	13.4
632	26,284	20,235	4,871	1,177	421	1.215	472	160	1,012	15	9.7
1,055	30,149	0	30,149	0	281	NA	471	584	1,084	50	9.8
736	17,707	17,707	0	0	216	NA	602	134	1,229	15	9.0
1,066	83,687	0	83,798	889	1,334	1.276	731	335	1,554	33	16.8
1,141	52,122	43,490	7,760	871	314	0.882	647	495	1,239	46	6.6
4,566	288,607	272,160	0	16,447	706	0.848	3,266	1,300	6,978	128	10.4
2,448	93,232	84,694	0	8,539	366	1.279	1,831	617	3,716	77	8.2
7,239	582,109	521,680	750	59,679	1,218	1.208	5,634	1,605	13,224	186	13.9
981	28,883	28,883	0	0	261	1.000	568	413	1,203	32	8.9
1,801	59,564	59,468	0	96	316	1.222	1,380	421	3,078	42	8.8
1,355	32,544	29,865	0	2,680	235	0.809	958	397	2,101	38	9.0
811	26,840	11,510	14,930	0	333	0.953	569	241	957	27	10.1
2,184	70,949	70,949	0	0	254	NA	1,713	471	2,885	57	7.8
903	25,409	25,409	0	0	200	NA	784	120	1,939	15	7.1
1,132	30,857	11,975	13,885	4,997	310	0.966	389	744	625	52	8.9
NA	NA	NA	0	NA	NA	NA	NA	NA	NA	NA	NA
NA	NA	NA	0	NA	NA	NA	NA	NA	NA	NA	NA
1,317	51,590	51,590	0	0	455	1.172	927	390	2,270	44	11.6
895	107,783	55,739	52,044	0	1,546	0.878	695	200	1,309	25	12.8
497	16,873	16,878	0	0	436	NA	344	153	645	15	12.9
<u>8,521</u>	<u>679,353</u>	<u>638,103</u>	<u>291</u>	<u>40,959</u>	<u>1,274</u>	<u>1.180</u>	<u>6,940</u>	<u>1,581</u>	<u>15,068</u>	<u>208</u>	<u>15.0</u>
71,646	3,961,150	3,215,511	505,602	240,038	742	\$1.145	51,802	19,849	111,117	2,040	12.5

Other Trucking Segments

(all dollar amounts in thousands)

Fleet Name, City & State	Gross Revenue	Total Operating Expenses	Net Operating Income	Interest Expense	Net Income	Operating Ratio	Profit Margin %	Salaries, Wages & Fringes	Fuel, Oil & Lubricants
TRUCKLOAD GENERAL FREIGHT									
ACE TRANSPORTATION, INC., LAFAYETTE, LA	\$91,016	\$90,417	\$598	\$836	\$786	99.3	0.96	\$21,217	\$46
BURLINGTON MOTOR CARRIERS, DALEVILLE, IN	249,520	239,347	10,173	10,793	(19,145)	95.9	-7.67	85,556	41,689
CRST, INC., CEDAR RAPIDS, IA	126,590	NA	NA	NA	NA	94.3	NA	0	NA
CONTRACT FREIGHTERS, INC., JOPLIN, MO	140,026	125,432	14,594	5,131	9,430	89.6	6.73	52,612	18,966
CRETE CARRIER CORP., LINCOLN, NE	152,483	141,877	10,606	576	10,905	93.0	7.15	32,682	15,385
CUSTOMIZED TRANSPORTATION, JACKSONVILLE, FL	89,350	84,147	5,203	5,590	(4,099)	94.2	-4.59	33,273	5,560
DART TRANSIT COMPANY, EAGAN, MN	104,227	100,764	3,463	1,221	1,661	96.7	1.61	5,470	0
DIRECT TRANSIT, INC., NORTH SIOUX CITY, SD	92,600	89,272	3,329	549	2,780	96.4	3.00	30,916	16,774
HEARTLAND EXPRESS OF IOWA, CORALVILLE, IA	73,796	70,340	3,455	0	2,231	95.3	3.02	13,590	6,126
INDEPENDENT FREIGHTWAY, INC., ROCKFORD, IL	158,656	151,945	6,711	1,661	2,827	95.8	1.78	7,064	0
J.B. HUNT TRANSPORT, INC., LOWELL, AR	731,584	672,312	59,272	10,823	27,604	91.9	3.80	292,984	77,769
LIGON NATIONWIDE, INC., MADISONVILLE, KY	101,322	98,328	2,994	2,184	227	97.0	0.22	6,377	0
M.S. CARRIERS, INC., MEMPHIS, TN	152,569	137,202	15,367	2,502	7,760	89.9	5.09	55,648	25,269
MERCER TRANSPORTATION CO., LOUISVILLE, KY	100,558	96,355	4,203	204	3,947	95.8	3.93	6,671	0
MISSOURI NEBRASKA EXPRESS, ST. JOSEPH, MO	288,660	283,123	5,537	2,856	1,661	98.1	0.58	53,098	21,561
MUNSON TRANSPORTATION, INC., MONMOUTH, IL	104,456	99,585	4,871	5,672	(496)	95.3	-0.47	36,949	12,999
NATIONAL FREIGHT, INC., VINELAND, NJ	101,869	103,212	(1,343)	3,699	(2,707)	101.3	-2.66	33,535	9,481
NEW PRIME, INC., SPRINGFIELD, MO	118,779	107,881	10,897	4,132	6,563	90.6	5.54	7,448	220
POOLE TRUCK LINE, INC., EVERGREEN, AL	101,727	101,485	232	5,081	(4,529)	99.8	-4.45	45,768	14,351
RANGER TRANSPORTATION, INC., JACKSONVILLE, FL	248,528	239,396	9,132	2,700	4,217	96.3	1.70	21,025	0
ROADRUNNER TRUCKING, INC., ALBUQUERQUE, NM	80,018	78,775	1,242	1,367	(956)	98.4	-1.19	22,100	12,476
ROBERSON TRPTN CO./PFT/CX, FARMER CITY, IL	80,053	78,062	1,991	964	1,433	97.5	1.79	15,063	7,020
RYDER DISTRIBUTION RESOURCES, MIAMI, FL	379,227	368,544	10,683	0	5,526	97.2	1.46	181,751	43,815
SCHNEIDER NATIONAL CARRIERS, GREEN BAY, WI	701,379	674,111	27,268	13,717	6,608	96.1	1.23	254,498	70,155
TRANSPORT CORP. OF AMERICA, MINNEAPOLIS, MN	88,387	NA	NA	NA	NA	NA	NA	NA	NA
U.S. XPRESS, INC., CHATTANOOGA, TN	73,470	64,673	8,797	4,837	2,148	88.0	2.92	30,374	13,468
UNIVERSAL AM-CAN, LTD., WARREN, MI	111,855	112,163	(309)	452	(1,179)	100.3	-1.05	11,900	460
WERNER ENTERPRISES, OMAHA, NE	322,749	288,673	33,876	2,060	16,641	89.5	5.78	126,445	38,587
TOTAL TRUCKLOAD GENERAL FREIGHT	\$5,150,454	\$4,947,931	\$202,523	\$28,525	\$60,184	95.5	1.67	\$1,483,694	\$452,177
TANK TRUCK									
CHEMICAL LEAMAN TANK LINES, EXTON, PA	\$202,029	\$191,563	\$10,466	\$4,944	\$5,546	94.8	2.79	\$67,063	\$6,322
DSI TRANSPORTS, INC., HOUSTON, TX	80,532	73,543	6,989	571	4,260	91.3	5.29	36,820	5,289
GROENDYKE TRANSPORT, INC., ENID, OK	89,579	86,696	2,882	1,931	1,135	96.6	1.27	36,842	4,467
KOCH SERVICE, INC., WICHITA, KS	106,635	96,489	12,145	0	8,526	88.6	7.85	45,009	12,010
MATLACK, INC., WILMINGTON, DE	191,855	190,722	1,133	4,227	(1,980)	99.4	-1.03	68,512	8,923
MONTGOMERY TANK LINES, INC., PLANT CITY, FL	132,443	121,177	11,266	8,208	2,012	91.5	1.52	10,880	1,102
TOTAL TANK TRUCK	\$665,572	\$630,140	\$35,431	\$15,661	\$19,569	94.4	2.43	\$267,126	\$38,113
MOTOR VEHICLE CARRIERS									
ALLIED SYSTEMS, LTD., DECATUR, GA	\$177,073	\$177,038	\$36	\$3,733	(\$4,271)	100.0	-2.41	\$98,507	\$10,808
ANCHOR MOTOR FREIGHT, BIRMINGHAM, MI	186,705	195,505	(8,800)	2,698	(11,433)	104.7	-6.12	102,628	14,775
CASSENS TRANSPORT CO., EDWARDSVILLE, IL	80,439	82,478	(2,040)	276	(1,403)	102.5	-1.74	44,991	5,197
COMMERCIAL CARRIERS, INC., TROY, MI	201,452	192,696	8,756	245	6,172	95.7	3.06	105,956	11,041
COMPLETE AUTO TRANSIT, INC., TROY, MI	183,523	180,598	2,925	855	1,910	98.4	1.04	98,660	11,218
M&G CONVOY, INC., TROY, MI	81,314	64,710	(3,396)	540	(2,641)	104.2	-3.25	42,389	3,700
TOTAL MOTOR VEHICLE CARRIERS	\$915,506	\$915,505	(\$2,510)	\$8,341	(\$7,580)	100.0	-1.28	\$493,131	\$56,739
REFRIGERATED COMMODITIES									
C.R. ENGLAND & SONS, INC., SALT LAKE CITY, UT	\$122,164	\$113,652	\$8,512	\$3,474	\$5,598	93.0	4.58	\$43,973	\$16,557
FFE TRANSPORTATION SERVICE, DALLAS, TX	139,926	131,795	8,131	1,489	5,353	94.2	3.83	19,252	2,115
FREY MILLER TRUCKING, INC., BAKERSFIELD, CA	92,360	90,217	2,143	4,550	(1,485)	97.7	-1.61	32,699	16,862
KLLM TRANSPORT SERVICES, INC., JACKSON, MS	129,571	120,707	8,864	4,037	2,820	93.2	2.18	42,517	22,608
MARTEN TRANSPORT, LTD., MONDOVI, WI	87,763	82,022	5,741	2,771	1,965	93.5	2.24	34,178	16,422
MIDWEST COAST TRANSPORT, SIOUX FALLS, SD	82,825	79,775	3,050	1,210	1,898	96.3	2.29	5,741	288
MONFORT TRANSPORTATION CO., GREELEY, CO	78,888	74,395	4,493	2	4,063	94.3	5.15	3,157	659
NATIONAL CARRIERS, INC., LIBERAL, KS	75,877	73,712	2,165	1,481	592	97.1	0.78	5,875	651
STEVENS TRANSPORT, MESQUITE, TX	83,287	75,801	7,486	NA	6,376	91.0	7.66	NA	NA
TOTAL REFRIGERATED COMMODITIES	\$660,661	\$642,076	\$18,585	\$19,024	\$27,181	94.3	3.04	\$187,382	\$76,160
OTHER SPECIALIZED CARRIERS									
ANDERSON TRUCKING SERVICE, ST. CLOUD, MN	\$119,466	\$116,240	\$3,226	\$1,417	\$990	97.3	0.83	\$25,086	\$9,912
BUILDERS TRANSPORT, INC., CAMDEN, SC	211,743	204,087	7,656	11,123	(3,385)	96.4	-1.60	78,010	27,937
MALONE FREIGHT LINES, INC., BIRMINGHAM, AL	77,090	75,960	1,130	215	529	98.5	0.69	3,235	0
MERCHANTS HOME DELIVERY SERVICE, OXNARD, CA	102,960	92,060	10,900	1,619	6,349	89.4	6.17	12,980	14
SIGNAL DELIVERY SERVICE, CLEVELAND, OH	171,490	167,233	4,257	4,058	(2,109)	97.5	-1.23	95,615	10,241
SWIFT TRANSPORTATION CO., INC., PHOENIX, AZ	190,337	177,274	13,063	2,948	6,466	93.1	3.40	77,908	31,181
TRI-STATE MOTOR TRANSIT, JOPLIN, MO	126,259	121,835	4,424	3,460	(157)	96.5	-0.12	44,184	8,076
TOTAL OTHER SPECIALIZED CARRIERS	\$909,345	\$854,689	\$54,656	\$24,840	\$8,663	95.5	0.87	\$337,018	\$85,361

Parts, Time Maintenance & Other	General Supplies & Expenses	Operating Taxes & Licenses	Insurance Expenses	Communi- cation & Utilities	Depreciation & Asset Disposition	Vehicle Rents/Purch Transport	Equipment Operated				Tons Carried	Total Mileage
							Trucks Owned	Trailers Owned	Trailers Operated	Leased Vehicles		
(52,261)	\$4,113	\$1,224	\$8,111	\$1,644	\$603	\$55,720	0	0	1,076	1,372	NA	34,620
34,225	10,601	7,318	15,031	2,638	12,594	29,695	0	783	4,028	1,476	3,220	236,536
0	NA	NA	NA	NA	NA	NA	0	820	1,808	0	NA	NA
10,878	4,379	5,223	2,610	2,010	15,166	13,568	0	1,184	1,966	150	1,422	125,737
7,312	2,320	2,951	4,817	1,274	9,130	66,026	0	708	1,982	0	2,678	150,469
16,547	7,622	983	1,676	956	1,700	15,830	3	1	597	278	1,896	31,603
6,647	3,078	1,432	2,578	927	3,281	77,351	2	0	1,650	999	1,098	97,866
8,428	4,171	3,764	5,857	2,056	(152)	17,458	0	0	2,099	959	NA	87,535
3,398	1,431	2,117	3,676	520	183	39,299	0	326	1,620	0	1,172	64,225
1,792	13,773	196	5,506	1,241	680	121,693	0	0	2,036	1,626	2,060	124,703
49,018	23,367	65,018	34,118	10,314	69,111	50,913	0	5,579	12,389	0	10,337	708,163
188	9,098	11	3,163	832	889	77,770	0	7	1,577	878	1,710	83,250
8,517	12,348	4,965	7,864	2,803	18,185	1,603	0	1,227	2,478	0	3,716	132,287
234	5,815	1,745	3,572	1,343	353	76,622	0	0	764	764	1,722	87,866
9,807	12,379	4,218	7,877	2,295	7,907	163,981	0	18	2,125	783	1,223	101,479
12,216	6,178	10,723	3,723	1,848	12,636	2,313	7	907	1,672	19	2,233	101,764
8,984	4,377	7,064	5,455	2,369	11,075	20,872	0	943	3,424	0	1,952	88,187
4,401	3,347	473	2,011	1,086	9,750	79,145	0	485	901	0	1,756	109,803
8,163	3,875	10,950	4,454	1,369	5,050	7,515	0	462	2,038	522	1,916	106,900
5,472	21,656	745	4,652	1,346	1,991	182,509	0	0	4,352	2,592	3,808	231,528
9,389	3,856	3,400	3,463	1,306	5,029	17,756	0	452	1,041	56	1,549	77,640
3,874	7,951	2,588	657	1,369	2,310	37,232	0	425	1,269	504	1,928	78,874
18,082	20,094	1,020	11,167	2,640	1,281	88,694	4	5	3,108	2,687	3,855	160,860
71,325	51,250	57,287	29,548	12,016	6,064	121,968	0	0	13,329	4,751	10,994	643,903
NA	NA	NA	NA	NA	NA	NA	0	626	1,699	100	NA	NA
2,700	674	1,084	3,317	869	2,054	10,133	0	9	966	557	NA	73,784
1,553	8,274	1,419	3,356	1,964	3,676	79,561	5	265	968	0	2,612	72,037
21,266	9,108	32,576	13,518	4,015	37,656	5,702	0	2,553	5,740	117	4,366	308,359
\$362,755	\$256,136	\$230,400	\$191,773	\$64,000	\$208,200	\$1,460,949	27	11,815	78,762	21,790	68,423	4,139,778
\$21,547	\$9,175	\$5,048	\$4,974	\$4,543	\$12,165	\$60,726	0	754	2,599	621	3,559	84,278
8,322	7,503	4,193	2,123	1,310	6,478	1,505	0	357	647	92	4,519	46,984
6,772	4,104	3,978	4,546	938	6,231	16,818	0	466	1,355	382	4,708	59,840
15,125	9,616	1,950	771	1,488	8,871	1,649	0	735	1,100	0	NA	56,949
32,453	12,620	8,997	7,522	4,451	12,746	34,498	25	757	2,602	477	5,764	81,419
4,847	3,484	1,226	4,401	1,111	8,027	86,099	0	386	2,428	588	2,219	72,177
\$89,088	\$46,502	\$25,310	\$24,833	\$13,641	\$54,518	\$2,012,295	25	3,455	10,731	2,160	20,769	401,647
\$13,283	\$14,465	\$9,319	\$8,866	\$1,056	\$5,360	\$15,374	0	395	1,165	932	2,227	69,342
13,293	25,783	4,576	10,607	1,573	21,020	1,250	0	1,898	2,073	77	2,260	64,244
7,321	3,252	5,048	4,384	597	4,981	6,707	0	425	83	261	1,683	37,393
17,101	6,702	10,426	6,292	1,072	12,890	21,216	0	1,332	1,607	207	3,497	78,829
16,070	(1,127)	9,814	5,461	1,635	18,771	20,096	0	1,401	1,382	0	1,968	79,305
8,262	2,687	3,422	5,210	578	5,684	12,773	0	530	782	157	1,099	27,650
\$75,330	\$51,762	\$40,605	\$40,820	\$9,571	\$68,736	\$77,421	0	3,981	7,672	1,634	12,734	354,760
\$9,931	\$3,720	\$13,010	\$2,477	\$1,395	\$6,765	\$15,824	0	16	1,213	1,019	1,207	131,535
5,805	6,407	1,106	4,051	2,257	814	89,988	0	0	727	570	1,408	86,038
8,823	7,229	4,306	3,880	1,655	7,190	7,573	0	704	919	20	1,078	86,513
26,386	0	4,820	4,053	6,438	13,887	0	0	939	1,370	0	1,862	116,624
6,387	2,906	3,584	3,562	1,123	10,695	3,165	0	659	907	36	1,214	78,700
2,107	1,916	123	2,303	635	1,236	65,426	0	0	623	649	935	82,687
3,095	1,915	1,751	1,859	579	285	61,095	0	3	907	611	1,166	76,975
2,614	3,829	674	1,999	297	811	56,962	0	1	724	554	1,170	73,982
NA	NA	NA	NA	NA	NA	NA	0	500	780	0	NA	NA
\$85,148	\$103,723	\$29,374	\$24,784	\$14,319	\$41,683	\$660,133	0	2,922	8,170	3,426	10,342	733,054
\$10,080	\$7,020	\$3,665	\$6,081	\$1,788	\$6,158	\$46,450	75	332	2,443	646	1,042	87,052
20,878	17,764	22,057	12,794	3,860	18,051	2,736	0	1,809	2,895	461	6,889	188,795
1,578	7,190	203	3,860	527	136	59,231	NA	NA	NA	0	1,831	70,699
832	7,641	128	8,332	699	901	60,533	0	0	0	837	NA	NA
9,780	18,014	8,721	5,956	964	14,589	3,333	5	952	6,804	0	NA	90,805
18,667	16,441	8,541	4,989	2,513	12,278	4,756	0	1,679	3,989	0	NA	NA
7,934	6,825	8,372	4,330	2,118	2,379	39,617	16	35	1,439	825	1,016	95,754
\$69,749	\$80,895	\$51,687	\$40,342	\$12,489	\$54,400	\$216,850	90	4,807	17,570	2,769	10,578	543,075

First Name, City, State	Gross Revenue	Total Operating Expenses	Net Operating Income	Interest Expense	Net Income	Operating Ratio	Profit Margin %
HOUSEHOLD GOODS							
ALLIED VAN LINES, INC., NAPERVILLE, IL	\$377,109	\$370,751	\$6,358	\$4,548	\$3,993	98.3	1.06
ATLAS VAN LINES, INC., EVANSVILLE, IN	212,394	200,532	11,861	9,299	2,378	94.4	1.12
BEKINS VAN LINES CO., HILLSDALE, IL	190,544	185,621	4,923	86	2,896	97.4	1.52
BURNHAM SERVICE CO., INC., COLUMBUS, GA	89,008	86,071	2,937	0	3,478	96.7	3.91
GRAEBEL VAN LINES, INC., WAUSAU, WI	95,906	93,251	2,656	373	1,338	97.2	1.40
MAYFLOWER TRANSIT, INC., CARMEL, IN	279,142	275,766	3,376	4,986	2,639	98.8	0.95
NORTH AMERICAN VAN LINES, INC., FT. WAYNE, IN	752,608	750,067	2,541	11,220	(11,320)	99.7	-1.50
UNITED VAN LINES, INC., FENTON, MO	474,913	474,624	289	2,704	1,378	99.9	0.29
TOTAL HOUSEHOLD GOODS	\$2,471,624	\$2,435,683	\$34,941	\$13,216	\$6,760	98.8	0.27

Definitions and Explanations Of Financial Terminology Used On The Charts

Operating Ratio: Operating expenses as a percentage of gross revenues. Since it excludes extraordinary expenses, income taxes and interest, individual peculiarities are eliminated so the ratio may be used as an industry-wide measure of performance.

Other Fringes: Includes charges such as federal and state payroll taxes, group and workers' compensation insurance, pension and retirement plans through both commercial insurance and unions.

Maintenance/Operating Supplies and Expenses: Includes fuel, oil, lubricants and coolants, vehicle parts, vehicle maintenance by outside vendors, tires and tubes, and miscellaneous supplies such as hand tools, brake fluid and antifreeze.

General Supplies and Expenses: Includes costs of administrative supplies including computer software, books, magazines, magnetic tapes, postage, stationery, printing of tariffs, advertising, commission agent fees, solicitation commissions, company personnel's T&E expenses. Also building and equipment rents and miscellaneous expenses such as fees for professional services by physicians, attorneys, etc., plus uncollectable revenues.

Operating Taxes and Licenses: Includes fuel and oil taxes, vehicle license and registration fees based on usage, real estate and personal property taxes, and tax items such as capital stock taxes, gross receipts taxes, occupancy taxes, etc.

Depreciation and Amortization & Gain or Loss on Disposition of Operating Assets: Includes depreciation of structures on owned land, revenue and shop equipment, furniture and office equipment; amortization of: improvements to leasehold property, fixed term motor carrier franchises, permits, licenses, patent rights, etc.; gain or loss on disposition of operating assets such as sold, traded or retired tractors, trailers and trucks.

Revenue Equipment Rents and Purchased Transportation: Includes amounts payable for: furnishing vehicles with or without the services of drivers, transportation of shipments in another carrier's vehicle including intermodal fleets, and allowance to shippers for picking up or delivering freight to a carrier's facility.

TOP 100

Fleets whose operating ratio improved the most

Fleet, City, State	No. of points OR improved
ANR Freight System, Denver, Colo.....	-15.6
FFE Transportation Service, Dallas, Tex.....	-3.7
U.S. Xpress, Chattanooga, Tenn.....	-3.2
United Parcel Service, Atlanta, Ga.....	-3.0
Chemical Leaman Tank Lines, Exton, Pa.....	-2.9

Fleets with the best post-tax net profit margin

Fleet, City, State	Post-tax Profit Margin
New Penn Motor Express, Lebanon, Pa.....	15.8%
Koch Service, Wichita, Kans.....	7.8%
Stevens Transport, Mesquite, Tex.....	7.7%
Southeastern Freight Lines, Columbia, S.C.....	7.4%
Estes Express, Richmond, Va.....	7.2%
Crete Carrier Corp., Lincoln, Neb.....	7.2%
Contract Freighters Inc., Joplin, Mo.....	6.7%
Merchants Home Delivery Service, Oxnard, Calif....	6.2%

Fleets whose post-tax net income improved the most

Fleet, City, State	Net Income by Percent Point Change
ANR Freight System, Denver, Colo.....	9.6
FFE Transportation Service, Dallas, Tex.....	2.7
Central Transport, Warren, Mich.....	2.5
Chemical Leaman Tank Lines, Exton, Pa.....	2.3
New Prime, Springfield, Mo.....	2.1
Customized Transportation, Jacksonville, Fla.....	2.1

oil fell from \$22.34 to \$19.19.

- Exports were up by \$42 billion and imports declined by \$3 billion.

- With the lowest Federal Reserve discount rate since the early 1960s, the prime interest rate dropped to 8.5%.

With a recessionary economy—which forced more than 2,000 carriers into bankruptcy—and all the other sour ingredients the industry had to cope with last year, it's miraculous that the cake came out of the truckers' oven in one piece.

But many of the nation's leading common carriers knew how to handle the heat.

As a result, group averages for the less-than-truckload, reefer and tank-truck sectors of the *Top 100* had essentially the same ORs in 1991 as they did the previous year.

And the truckload carriers' aggregate OR improved from 94.8 in 1990 to 90.9 last year.

So, the latest *Top 100* cake is palatable. But any way you slice it, it's hard to swallow. And not many fleets would want "seconds."

Net income up 4%

Compared to 1990 data, the aggregate gross revenues were up 5.9% last year, and expenses climbed 6%. The group's post-tax net income rose 4%.

And although their aggregate revenues increased 5.5%, the Big Four—United Parcel Service, Yellow Freight, Consolidated Freightways and Roadway Express—continued to capture about 49% of the total *Top 100* revenues.

The Big Four had 19.5% of the *Top 100* fleets' revenues when the rankings were first published in 1968.

But, of those four, only Roadway improved its operating ratio (95.2) last year.

Lowest OR

For the fourth time in five years, New Penn Motor Express

Continued

TOP 100

(all dollar amounts in thousands)

1991 Revenue Rank	Fleet Name, City, State	Carrier Type	1991 Revenue	1992 Revenue	1990 Revenue Rank	Operating Ratio			
						1991	Rank	1990	Rank
1	UNITED PARCEL SERVICE (OHIO), ATLANTA, GA	CMGF	\$6,524,001	\$7,908,781	1	92.9	21	93.7	28
2	UNITED PARCEL SERVICE (NEW YORK), ATLANTA, GA	CMGF	3,196,740	2,958,831	2	97.0	57 T	100.0	91
3	YELLOW FREIGHT SYSTEM, INC., OVERLAND PARK, KS	CMGF	2,323,268	2,278,540	3	98.9	79	95.2	37
4	CONSOLIDATED FREIGHTWAYS CORP., PORTLAND, OR	CMGF	2,045,250	2,080,794	4	97.7	68 T	95.2	37
5	ROADWAY EXPRESS, INC., AKRON, OH	CMGF	2,041,314	1,965,196	5	95.2	40	95.2	41
6	OVERNITE TRANSPORTATION CO., RICHMOND, VA	CMGF	799,769	801,832	6	95.0	39	90.6	13
7	ABF FREIGHT SYSTEM, INC., FORT SMITH, AR	CMGF	783,024	750,892	8	96.3	48 T	95.1	35
8	NORTH AMERICAN VAN LINES, INC., FORT WAYNE, IN	CMHG	752,608	775,648	7	99.7	84	102.0	94
9	J.B. HUNT TRANSPORT, INC., LOWELL, AR	CMGF	731,584	579,831	9	91.9	17	90.2	11
10	SCHNEIDER NATIONAL CARRIERS INC., GREEN BAY, WI	CMGF	701,379	583,845	NR	96.1	47	94.0	NR
11	CAROLINA FREIGHT CARRIERS CORP., CHERRYVILLE, NC	CMGF	583,592	572,222	10	98.6	77	98.4	73
12	CON-WAY TRANSPORTATION SERVICES, PORTLAND, OR	CMGF	534,496	484,838	11	92.4	19	88.8	5
13	UNITED VAN LINES, INC., FENTON, MO	CMHG	474,913	473,497	12	99.9	86 T	99.6	87
14	PRESTON TRUCKING COMPANY, INC., PRESTON, MD	CMGF	414,138	404,564	13	100.8	93	98.6	74
15	RYDER DISTRIBUTION RESOURCES, INC., MIAMI, FL	CTGF	379,227	314,735	16	97.2	60 T	96.4	50
16	ALLIED VAN LINES, INC., NAPERVILLE, IL	CMHG	377,109	398,580	14	98.3	72	98.6	74
17	WERNER ENTERPRISES, INC., OMAHA, NE	CTGF	322,749	305,134	18	89.5	7	89.2	8
18	ST. JOHNSBURY TRUCKING CO., INC., HOLLISTON, MA	CMGF	304,721	331,883	15	100.5	91	95.1	35
19	CENTRAL TRANSPORT, INC., WARREN, MI	CMGF	302,328	265,263	19	98.4	73 T	99.6	87
20	MISSOURI NEBRASKA EXPRESS (MNX), ST. JOSEPH, MO	CMGF	288,660	198,920	38	98.1	70 T	98.2	72
21	TNT HOLLAND MOTOR EXPRESS, INC., HOLLAND, MI	CMGF	283,459	250,870	20	91.0	11 T	88.8	5
22	MAYFLOWER TRANSIT, INC., CARMEL, IN	CMHG	279,142	310,477	17	98.8	78	99.0	80
23	WATKINS MOTOR LINES, INC., LAKELAND, FL	CMGF	267,445	246,551	21	94.3	31 T	93.7	28
24	NORTHWEST TRANSPORT SERVICE, COMMERCE CITY, CO	CMGF	258,844	223,054	29	94.9	37 T	91.9	20
25	BURLINGTON MOTOR CARRIERS, INC., DALEVILLE, IN	CMGF	249,520	235,231	25	95.9	46	94.6	31
26	RANGER TRANSPORTATION, INC., JACKSONVILLE, FL	CMGF	248,528	236,845	24	96.3	48 T	97.2	58
27	VIKING FREIGHT SYSTEM, INC., SAN JOSE, CA	CMGF	233,754	223,495	28	93.7	28	90.8	16
28	CENTRAL FREIGHT LINES, INC., WACO, TX	CMGF	219,422	226,418	27	97.5	65 T	96.5	52
29	ATLAS VAN LINES, INC., EVANSVILLE, IN	CMHG	212,394	216,679	32	94.4	34 T	93.1	26
30	BUILDERS TRANSPORT, INC., CAMDEN, SC	CTBM	211,743	240,756	22	96.4	51 T	97.3	60
31	CHEMICAL LEAMAN TANK LINES, INC., EXTON, PA	CTLP	202,029	210,871	35	94.8	36	97.7	66
32	COMMERCIAL CARRIERS, INC., TROY, MI	CMMV	201,452	204,385	36	95.7	43	97.3	60
33	ARKANSAS FREIGHTWAYS CORP., HARRISON, AR	CMGF	198,465	142,952	47	92.7	20	90.4	12
34	MATLACK, INC., WILMINGTON, DE	CTLP	191,355	216,685	31	99.4	83	96.8	55
35	BEKINS VAN LINES COMPANY, HILLSIDE, IL	CMHG	190,544	212,704	33	97.4	64	97.8	68
36	SWIFT TRANSPORTATION COMPANY, INC., PHOENIX, AZ	CMSC	190,337	156,330	43	93.1	24	90.1	10
37	ANCHOR MOTOR FREIGHT, INC., BIRMINGHAM, MI	CTMV	186,705	231,315	26	104.7	98	100.3	92
38	COMPLETE AUTO TRANSIT, INC., TROY, MI	CTMV	183,523	217,058	30	96.4	73 T	97.4	62
39	ALLIED SYSTEMS LTD., DECATUR, GA	CTMV	177,073	199,579	37	100.0	88	99.8	90
40	SIGNAL DELIVERY SERVICE, INC., CLEVELAND, OH	CTSC	171,490	211,593	34	97.5	65 T	96.1	47
41	TNT RED STAR EXPRESS, INC., AUBURN, NY	CMGF	170,563	158,873	41	100.1	89	97.4	62
42	AAA COOPER TRANSPORTATION, DOTHAN, AL	CMGF	166,887	157,863	42	91.1	13	89.0	7
43	CHURCHILL TRUCK LINES, INC., CHILLICOTHE, MO	CMGF	164,994	160,999	40	100.6	92	98.1	71
44	AVERITT EXPRESS, INC., COOKEVILLE, TN	CMGF	164,006	142,657	48	93.4	26	93.9	30
45	SOUTHEASTERN FREIGHT LINES, INC., COLUMBIA, SC	CMGF	158,927	154,422	45	92.3	18	90.6	13
46	INDEPENDENT FREIGHTWAY, INC., ROCKFORD, IL	CMGF	158,656	154,877	44	95.8	44 T	96.1	47
47	OLD DOMINION FREIGHT LINE, INC., HIGH POINT, NC	CMGF	155,864	147,319	46	91.5	15 T	92.6	21
48	M.S. CARRIERS, INC., MEMPHIS, TN	CTGF	152,569	123,577	57	89.9	9	89.4	9
49	CRETE CARRIER CORPORATION, LINCOLN, NE	CMGF	152,483	131,366	50	93.0	22 T	95.0	33
50	CONTRACT FREIGHTERS, INC., JOPLIN, MO	CMGF	140,026	119,864	58	89.6	8	87.5	4

For Top 100 listings under "Type": BM—building materials; CM—common; CT—contracts; GF—general freight; ED—explosives/dangerous articles; FP—forest products; HG—household goods; HM—heavy machinery; LP—liquid petroleum (including, in most cases, other bulk materials); MV—motor vehicles; RS—retail store delivery; SC—specific commodity not otherwise grouped; T—tie in Operating Ratio; NR—not ranked.

1991 Revenue Rank	Fleet Name, City, State	Carrier Type	1991 Revenue	1990 Revenue	1990 Revenue Rank	Operating Ratio			
						1991	Rank	1990	Rank
51	FFE TRANSPORTATION SERVICE, INC., DALLAS, TX	CMRC	\$139,926	\$130,908	51	94.2	29 T	97.9	69
52	A-P-A TRANSPORT CORP., NORTH BERGEN, NJ	CMGF	138,043	141,852	49	94.4	34 T	92.6	21
53	MONTGOMERY TANK LINES, INC., PLANT CITY, FL	CMLP	132,443	126,563	52	91.5	15 T	91.1	17
54	NEW PENN MOTOR EXPRESS, INC., LEBANON, PA	CMGF	129,618	125,025	55	79.7	1	79.3	1
55	KLLM, INC., JACKSON, MS	CMRC	129,571	125,759	53	93.2	25	92.7	25
56	CRST, INC., CEDAR RAPIDS, IA	CMGF	126,590	119,349	NR	94.3	31 T	94.6	NR
57	TRI-STATE MOTOR TRANSIT CO., JOPLIN, MO	CMSC	126,259	116,192	59	96.5	53	95.0	33
58	ANR FREIGHT SYSTEM, INC., DENVER, CO	CMGF	123,442	169,031	39	125.3	100	140.9	100
59	C.R. ENGLAND & SONS, INC., SALT LAKE CITY, UT	CMRS	122,164	97,191	72	93.0	22 T	92.6	21
60	ADVANCE TRANSPORTATION COMPANY, MILWAUKEE, WI	CMGF	119,980	114,289	60	98.1	70 T	96.4	50
61	ANDERSON TRUCKING SERVICE, INC., ST. CLOUD, MN	CTSC	119,466	113,204	61	97.3	62 T	95.2	37
62	NEW PRIME, INC., SPRINGFIELD, MO	CMGF	118,779	98,633	71	90.8	10	92.6	21
63	UNIVERSAL AM-CAN, LTD., WARREN, MI	CMGF	111,855	105,635	64	100.3	90	98.8	78
64	ESTES EXPRESS LINES, RICHMOND, VA	CMGF	111,477	96,861	NR	87.5	2	84.1	NR
65	SAIA MOTOR FREIGHT LINE, INC., HOUMA, LA	CMGF	109,402	102,553	69	89.1	5	86.1	3
66	KOCH SERVICE, INC., WICHITA, KS	CMLP	108,635	102,111	70	88.8	4	85.3	2
67	MERCHANTS FAST MOTOR LINES, INC., ABILENE, TX	CMGF	105,286	103,168	68	99.3	81 T	98.6	74
68	MUNSON TRANSPORTATION, INC., MONMOUTH, IL	CMGF	104,456	107,850	63	95.3	41 T	95.7	43
69	HYMAN FREIGHTWAYS, INC., ST. PAUL, MN	CMGF	104,260	103,637	67	99.0	80	99.0	80
70	DART TRANSIT COMPANY, EAGAN, MN	CMGF	104,227	97,083	73	96.7	54 T	95.2	37
71	G.I. TRUCKING COMPANY, LA MIRADA, CA	CMGF	103,334	103,815	66	97.3	62 T	94.7	32
72	MERCHANTS HOME DELIVERY SERVICE, INC., OXNARD, CA	CMSC	102,960	96,236	74	89.4	6	91.5	18
73	NATIONAL FREIGHT, INC., VINELAND, NJ	CMGF	101,869	123,693	56	101.3	94	99.7	89
74	POOLE TRUCK LINE, INC., EVERGREEN, AL	CTGF	101,727	110,734	62	99.8	85	96.7	53
75	LIGON NATIONWIDE, INC., MADISONVILLE, KY	CMGF	101,322	104,855	65	97.0	57 T	97.7	66
76	MERCER TRANSPORTATION CO., INC., LOUISVILLE, KY	CMGF	100,558	88,305	NR	95.8	44 T	96.0	NR
77	GRAEBEL VAN LINES, INC., WAUSAU, WI	CMHG	95,906	94,175	75	97.2	60 T	97.2	58
78	DIRECT TRANSIT, INC., NORTH SIOUX CITY, SD	CMGF	92,600	64,141	NR	96.4	51 T	95.8	NR
79	FREYMLER TRUCKING, INC., BAKERSFIELD, CA	CMRC	92,360	86,086	78	97.7	68 T	90.6	13
80	ACE TRANSPORTATION, INC., LAFAYETTE, LA	CMGF	91,016	125,527	54	99.3	81 T	98.8	78
81	GROENDYKE TRANSPRT, INC., ENID, OK	CMLP	89,579	85,787	79	96.8	56	95.8	44
82	SPARTAN EXPRESS, INC., GREER, SC	CMGF	89,488	78,595	88	107.0	99	104.3	97
83	CUSTOMIZED TRANSPORTATION, INC., JACKSONVILLE, FL	CTGF	89,350	95,590	NR	94.2	29 T	95.5	NR
84	BURNHAM SERVICE COMPANY, INC., COLUMBUS, GA	CMHG	89,008	92,513	77	96.7	54 T	96.7	53
85	TRANSPORT CORP. OF AMERICA, MINNEAPOLIS, MN	CMGF	88,387	88,259	NR	94.9	37 T	94.4	NR
86	MARTEN TRANSPORT, LTD., MONDOVI, WI	CMRC	87,763	81,349	84	93.5	27	93.4	27
87	STEVENS TRANSPORT, MESQUITE, TX	CMRC	83,287	71,060	NR	91.0	11 T	90.8	NR
88	MIDWEST COAST TRANSPORT, L.P., SIOUX FALLS, SD	CMRC	82,825	79,261	87	96.3	48 T	96.3	49
89	M&G CONVOY, INC., TROY, MI	CMGV	81,314	92,817	76	104.2	97	103.4	96
90	TRANSUS, INC., ATLANTA, GA	CMGF	81,208	80,370	85	101.7	95	98.7	77
91	DSI TRANSPORTS, INC., HOUSTON, TX	CMLP	80,532	76,486	89	91.3	14	91.6	19
92	CASSENS TRANSPORT COMPANY, EDWARDSVILLE, IL	CMGV	80,439	74,969	92	102.5	96	102.2	95
93	ROBEPSON TRPTN CO./PFT/CX, FARMER CITY, IL	CMGF	80,053	83,715	81	97.5	65 T	97.9	69
94	ROADRUNNER TRUCKING, INC., ALBUQUERQUE, NM	CMGF	80,018	82,794	82	98.4	73 T	96.0	46
95	MONFORT TRANSPORTATION CO., GREELEY, CO	CMRC	78,888	69,140	NR	94.3	31 T	95.0	NR
96	MALONE FREIGHT LINES, INC., BIRMINGHAM, AL	CMSC	77,090	70,986	96	98.5	76	99.5	86
97	NATIONAL CARRIERS, INC., LIBERAL, KS	CMRC	75,877	76,248	90	97.1	59	95.8	44
98	WILLIG FREIGHT LINES, SAN FRANCISCO, CA	CMGF	75,189	81,367	83	99.9	86 T	95.6	42
99	HEARTLAND EXPRESS INC. OF IOWA, CORALVILLE, IA	CMGF	73,796	62,810	NR	95.3	41 T	97.4	NR
100	U.S. XPRESS, INC., CHATTANOOGA, TN	CMGF	73,470	54,421	NR	88.0	3	91.2	NR

	Gross Revenue	Expenses	Post Tax Net Income
Total Top 100-1991	\$36,832,661	\$35,237,981	\$818,857
Total Top 100-1990	\$34,748,368	\$33,235,682	\$790,676
Total Top 100-1989	\$32,356,211	\$30,983,015	\$730,865

TOP 100

(all dollar amounts in thousands)

1991 Revenue Rank	Firm Name, City, State	Carrier Type	1991 Revenue	1990 Revenue	Operating Ratio	
					1991	1990
101	JACK COOPER TRANSPORT COMPANY, OKLAHOMA CITY, OK	CMMV	\$73,372	\$79,509	99.5	97.5
102	AMERICAN PRESIDENT TRUCKING CO., LTD., OAKLAND, CA	CMGF	72,753	53,059	98.8	112.0
103	MILLER TRANSPORTERS, INC., JACKSON, MS	CTLP	72,376	75,929	98.4	99.0
104	E&L TRANSPORT COMPANY, WAYNE, MI	CTMV	71,673	85,735	110.1	109.7
105	JACK GRAY TRANSPORT, INC., GARY, IN	CMSC	71,355	74,530	98.6	97.0
106	DALLAS & MAVIS FORWARDING CO., KENOSHA, WI	CMMV	67,932	74,243	95.4	96.9
107	ROEHL TRANSPORT, INC., MARSHFIELD, WI	CMGF	67,399	60,051	91.8	88.9
108	WILLIS SHAW FROZEN EXPRESS, INC., ELM SPRINGS, AR	CTRC	67,325	63,830	90.2	90.5
109	FORE WAY EXPRESS, INC., WAUSAU, WI	CMGF	65,760	67,469	99.8	99.2
110	P.A.M. TRANSPORTATION SERVICES, TONTITOWN, AR	CMGF	65,722	57,545	101.8	105.3
111	PAUL ARPIN VAN LINES, EAST GREENWICH, RI *	CMHG	65,404	55,473	97.8	99.0
112	SOUTHWEST MOTOR FREIGHT, INC., CHATTANOOGA, TN	CMGF	64,061	58,977	92.5	99.9
113	PACIFIC MOTOR TRUCKING CO., OKLAHOMA CITY, OK	CTMV	63,887	64,370	92.6	93.8
114	CROUSE CARTAGE COMPANY, CARROLL, IA	CMGF	63,449	61,168	95.9	95.3
115	GLOBAL VAN LINES, INC., ORANGE, CA	CMHG	62,326	56,865	98.5	98.2
116	TNT REDDAWAY TRUCK LINE, INC., CLACKAMAS, OR	CMGF	61,615	50,976	88.8	88.1
117	MAY TRUCKING COMPANY, PAYETTE, ID	CMRC	61,356	60,002	99.0	99.3
118	JONES MOTOR COMPANY, INC., SPRING CITY, PA	CMGF	61,176	64,890	100.4	101.6
119	ACME TRUCK LINE, INC., HARVEY, LA	CMGF	60,988	61,436	97.8	97.3
120	STANDARD TRUCKING COMPANY, CHARLOTTE, NC	CMGF	60,090	58,472	99.4	97.5
121	NEW ENGLAND MOTOR FREIGHT, INC., ELIZABETH, NJ	CMGF	60,030	56,891	96.8	96.7
122	TNT BESTWAY TRANSPORTATION, INC., PHOENIX, AZ *	CMGF	59,731	60,404	98.5	94.2
123	ARROW TRUCKING COMPANY, TULSA, OK	CMSC	59,372	49,073	94.1	93.4
124	SHAFFER TRUCKING, INC., NEW KINGSTOWN, PA	CMRC	59,238	49,550	91.4	92.2
125	WILSON TRUCKING CORP., FISHERSVILLE, VA	CMGF	59,029	59,632	95.0	92.8
126	CONTRACT TRANSPORTATION SYSTEMS CO., CLEVELAND, OH	CTGF	59,005	54,206	88.5	91.7
127	MORGAN DRIVE AWAY, INC., ELKHART, IN	CMSC	58,607	65,950	100.0	97.6
128	ALTERMAN TRANSPORT LINES, INC., OPA LOCKA, FL	CMRC	58,204	58,618	98.4	100.0
129	WARREN TRANSPORT, INC., WATERLOO, IA	CMGF	57,003	56,049	93.1	93.1
130	SOUTHWESTERN MOTOR TRANSPORT, SAN ANTONIO, TX	CMGF	56,361	57,871	98.2	97.6
131	BE-MAC TRANSPORT CO., INC., ST. LOUIS, MO	CMGF	54,827	52,914	101.4	100.0
132	CENTRAL TRANSPORT, INC., HIGH POINT, NC	CTLP	54,813	57,528	92.4	95.8
133	SAVAGE INDUSTRIES, INC., SALT LAKE CITY, UT	CMBC	54,700	45,331	97.7	93.8
134	PBX, INC., DAKOTA CITY, NE	CTGF	54,129	50,671	89.7	88.5
135	GLENN McCLENDON TRUCKING CO., INC., LAFAYETTE, AL	CMGF	54,085	50,056	91.3	91.8
136	HADLEY AUTO TRANSPORT, SANTA ANA, CA	CTMV	53,634	57,518	98.9	97.1
137	CARNACO TRANSPORT, INC., OCONOMOWOC, WI	CTRC	53,135	50,000	91.5	91.0
138	WILEY SANDERS TRUCK LINES, INC., TROY, AL	CMGF	52,778	50,970	88.5	83.2
139	JACK B. KELLEY, INC., AMARILLO, TX	CMSC	52,583	57,380	100.5	99.4
140	ARMELLINI EXPRESS LINES, INC., PALM CITY, FL	CMRC	52,556	51,060	98.5	98.4
141	USA TRUCK, INC., VAN BUREN, AR	CMGF	52,538	45,684	88.9	NA
142	TRANSCONTINENTAL REFRIGERATED LINES, PITTSBURGH, PA	CMRP	52,157	40,797	94.0	99.5
143	MOTOR CARGO, NORTH SALT LAKE, UT	CMGF	51,853	49,068	95.0	91.9
144	DEATON, INC., BIRMINGHAM, AL	CMSC	50,753	52,511	102.3	99.5
145	JONES TRANSFER COMPANY, MONROE, MI	CTGF	50,748	60,035	104.7	99.6
146	BULKMATIC TRANSPORT COMPANY, GRIFFITH, IN	CMBC	50,746	46,104	95.7	94.5
147	TLC LINES, INC., ST. CLAIR, MO	CMGF	50,601	50,653	99.0	98.5
148	TRANSPORT SERVICE CO., HINSDALE, IL	CTLP	50,024	43,589	89.1	88.1
149	LYNDEN TRANSPORT, INC., KENT, WA	CMGF	49,534	46,691	95.5	92.3
150	TMC TRANSPORTATION, INC., DES MOINES, IA	CTGF	49,486	49,732	95.2	94.0

1991 Revenue Rank	Fleet Name, City, State	Carrier Type	1991 Revenue	1990 Revenue	Operating Ratio	
					1991	1990
151	McKENSIE TANK LINES, INC., TALLAHASSEE, FL	CMLP	\$49,428	\$48,908	95.1	96.8
152	COMMERCIAL CARRIER CORP., AUBURNDALE, FL	CMGF	48,900	50,297	93.3	89.2
153	GREAT COASTAL EXPRESS, INC., CHESTER, VA	CMGF	47,904	45,507	93.0	89.9
154	SMITHWAY MOTOR XPRESS, INC., FORT DODGE, IA *	CMGF	47,368	47,486	95.8	96.3
155	NU-CAR CARRIERS, INC., BIRMINGHAM, MI	CMMV	47,057	73,896	123.4	108.0
156	ECK MILLER TRANSPORTATION CORP., ROCKPORT, IN	CMGF	46,017	46,988	94.9	96.7
157	KENAN TRANSPORT COMPANY, CHAPEL HILL, NC	CMLP	45,940	45,397	93.4	96.9
158	WARD TRUCKING CORP., ALTOONA, PA *	CMGF	45,750	44,353	99.6	103.9
159	SKYWAY FREIGHT SYSTEM, INC., SANTA CRUZ, CA	CMGF	45,484	NA	91.6	NA
160	FREDRICKSON MOTOR EXPRESS CORP., CHARLOTTE, NC	CMGF	45,419	44,155	97.7	99.5
161	PITT OHIO EXPRESS, INC., PITTSBURGH, PA	CMGF	45,132	36,384	85.5	85.4
162	VICTORY EXPRESS, INC., MEDWAY, OH	CMGF	45,073	37,069	90.8	89.7
163	THE MASON & DIXON LINES, INC., WARREN, MI	CMGF	43,537	42,678	98.1	97.0
164	WHEATON VAN LINES, INC., INDIANAPOLIS, IN *	CMHG	42,931	46,810	100.2	98.9
165	LANTER COMPANY, MADISON, IL	CMGF	42,586	11,220	92.8	93.0
166	MIDDLEWEST FREIGHTWAYS, INC., ST. LOUIS, MO	CMGF	42,561	45,048	104.7	99.0
167	KEYSTONE LINES, ANAHEIM, CA	CMGF	42,286	41,775	100.0	98.1
168	PACIFIC MOTOR TRANSPORT, LAFAYETTE, CA	CMSC	41,826	38,312	93.8	94.0
169	GREAT AMERICAN LINES, INC., MURRYSVILLE, PA	CMGF	41,685	41,889	99.2	97.9
170	GEORGE TRANSFER, INC., PARKTON, MD	CMGF	41,604	41,340	98.2	97.5
171	SMALLEY TRANSPORTATION COMPANY, TAMPA, FL	CMGF	41,194	51,972	103.7	100.6
172	NEW WORLD VAN LINES, INC., CHICAGO, IL	CMHG	40,926	40,925	95.1	94.8
173	D.M. BOWMAN, INC., WILLIAMSPORT, MD	CMGF	40,854	43,378	97.7	97.1
174	CTL DISTRIBUTION, INC., MULBERRY, FL *	CMSC	40,471	27,337	94.0	96.1
175	RED ARROW FREIGHT LINES, INC., CHERRYVILLE, NC	CMGF	40,275	32,968	100.9	100.2
176	DAILY EXPRESS, INC., CARLISLE, PA	CMSC	40,199	47,632	98.0	97.0
177	THE MANFREDI MOTOR TRANSIT CO., NEWBURY, OH	CMRC	39,995	41,076	95.7	93.3
178	UNION PACIFIC MOTOR FREIGHT CO., ST. LOUIS, MO	CMGF	39,750	40,399	86.8	94.9
179	SCHWERMANN TRUCKING CO., MILWAUKEE, WI	CMBC	39,265	39,365	99.9	97.8
180	COLONIAL FREIGHT SYSTEMS, INC., KNOXVILLE, TN	CMRC	39,217	38,115	99.0	97.5
181	SUNFLOWER CARRIERS, INC., YORK, NE	CTGF	39,080	30,741	90.2	91.8
182	MILAN EXPRESS CO., INC., MILAN, TN	CMGF	39,066	38,014	97.4	97.3
183	RUAN TRANSPORT CORP., DES MOINES, IA *	CMGF	38,999	35,191	100.0	99.6
184	HOLMES FREIGHT LINES, INC., OMAHA, NE *	CMGF	38,987	38,211	99.5	95.9
185	LIQUID TRANSPORTERS, INC., LOUISVILLE, KY	CMLP	38,387	39,068	100.4	94.9
186	PLOOF TRUCK LINES, INC., JACKSONVILLE, FL *	CMGF	38,319	41,489	91.7	86.7
187	INDUSTRIAL FREIGHT SYSTEM, INC., SUN VALLEY, CA	CMGF	38,219	49,025	97.5	98.6
188	A.J. METLER HAULING & RIGGING, INC., KNOXVILLE, TN	CMSC	36,807	38,693	98.9	98.5
189	MOUNTAINSIDE TRANSPORT, INC., CLEVELAND, OH	CTGF	36,725	35,218	100.2	99.4
190	UMTHUN TRUCKING COMPANY, EAGLE GROVE, IA	CTGF	36,696	39,135	100.7	99.5
191	COMPASS TRANSPORTATION, INC., YOUNGSTOWN, OH	CMSC	36,399	37,678	100.2	99.9
192	SUPERIOR CARRIERS, INC., OAK BROOK, IL	CMLP	36,350	33,538	93.3	92.3
193	FLORIDA ROCK & TANK LINES, INC., JACKSONVILLE, FL	CMLP	36,288	36,301	93.7	95.8
194	CRESCENT TRUCK LINES, INC., UNION CITY, CA	CMGF	35,901	36,800	96.9	94.5
195	BOYD BROTHERS TRANSPORTATION CO., CLAYTON, AL	CMGF	35,872	34,730	91.8	90.2
196	GOODWAY TRANSPORT, INC., YORK, PA	CMRS	35,734	29,941	96.3	95.3
197	ENTERPRISE TRANSPORTATION CO., HOUSTON, TX	CMLP	35,679	38,142	98.0	94.1
198	SCHANNO TRANSPORTATION, WEST ST. PAUL, MN	CMRC	35,484	36,553	95.2	99.9
199	B&W CARTAGE CO., INC., TAYLOR, MI	CMGF	35,150	34,873	99.9	100.5
200	SCHNEIDER NATIONAL BULK CARRIERS, GREEN BAY, WI	CMBC	34,970	32,158	97.2	92.9

TOP 100

had the lowest OR—79.7. The previous year, the Lebanon, Pa.-based, regional LTL carrier's OR was 79.3.

The next best ORs were posted by Estes Express Lines, Richmond, Va., with an 87.5, and U.S. Xpress of Chattanooga, Tenn., with a 88.0.

As the 100th ranked carrier on this year's list, U.S. Xpress made the *Top 100* for the first time.

Where *Top 100* data came from

Trucking data experts at Transportation Technical Services (TTS), Fredericksburg, Va., compiled the *Top 100* information exclusively for CCJ. The data is based on reports filed with the Interstate Commerce Commission by Class I and II carriers.

TTS, which is the sister company of the Central Analysis Bureau, New York City, maintains key information on 46,000 for-hire and private fleets. □

Big Improvement In 1992's 1st quarter

The *Top 100* carriers' revenues, earnings and traffic volume "increased substantially" in the first quarter of 1992—compared to the same period a year ago—according to the Interstate Commerce Commission.

The ICC attributes the increases to improvements in the U.S. economy.

Compared to the first quarter of 1991:

- total tons hauled were up 10.3%;
- aggregate operating revenues increased 9.8%;
- net operating income jumped 129.9%;
- and post-tax net income skyrocketed by 498.0%.

Profit comparison by type fleet average

	1991 OR	1990 OR	1991 Profit Margin	1990 Profit Margin
Less-than-truckload.....	95.5	95.3	2.67%	2.74%
Truckload.....	90.9	94.8	1.67%	2.04%
Tank Truck.....	94.4	94.5	2.43%	2.25%
Reefers.....	94.3	95.3	3.04%	1.76%
Car Haulers.....	100.3	100.3	-1.28%	-1.47%
Household Goods.....	98.6	99.2	0.27%	0.30%

Truckload carriers

Highest Revenue Per Mile	Rev./Mile
Missouri Nebraska Express, St. Joseph, Mo.	\$2.84
Customized Transportation, Jacksonville, Fla.	\$2.83
Ace Transportation, Lafayette, La.	\$2.63
Highest Revenue Per Ton	Rev./Ton
Contract Freighters, Joplin, Mo.	\$98.47
Ryder Distribution Services, Miami, Fla.	\$98.37
Dart Transit, Eagan, Minn.	\$94.92
Highest Interest as a % of Revenue	Percentage
U.S. Xpress, Chattanooga, Tenn.	6.58%
Customized Transportation, Jacksonville, Fla.	6.26%
Munson Transportation, Monmouth, Ill.	

Tank truck fleets

Highest Revenue Per Mile	Rev./Mile
Chemical Leaman Tank Lines, Exton, Pa.	\$2.40
Matlack, Wilmington, Del.	\$2.36
Koch Service, Wichita, Kan.	\$1.91
Highest Revenue Per Ton	Rev./Ton
Montgomery Tank Lines, Plant City, Fla.	\$59.69
Chemical Leaman Tank Lines, Exton, Pa.	\$56.77
Matlack, Wilmington, Del.	\$33.29
Highest Interest as a % of Revenue	Percentage
Montgomery Tank Lines, Plant City, Fla.	6.20%
Chemical Leaman Tank Lines, Exton, Pa.	2.45%
Matlack, Wilmington, Del.	2.20%

Less-than-truckload carriers

	Million Tons
Highest No. of Tons Carried	
Yellow Freight System, Overland, Kan.	8.5
Roadway Express, Akron, Oh.	7.2
Consolidated Freightways, Portland, Ore.	7.0
Highest Average Load	Tons
Northwest Transport Service, Commerce City, Colo.	16.8
Yellow Freight System, Overland Park, Kan.	15.0
Consolidated Freightways, Portland, Ore.	14.5
Lowest Linehaul Cost Per Mile	Cost/Mile
Averitt Express, Cookeville, Tenn.	72.7¢
Southeastern Freight Lines, Columbia, S.C.	80.9¢
Overnite Transportation, Richmond, Va.	84.8¢
Highest Average Length of Haul	Miles
Watkins Motor Lines, Lakeland, Fla.	1,546
Consolidated Freightways, Portland, Ore.	1,390
Northwest Transport Service, Commerce City, Colo.	1,334
Highest Total Mileage	Million Miles
Yellow Freight System, Overland Park, Kan.	679.4
Consolidated Freightways, Portland, Ore.	625.4
Roadway Express, Akron, Oh.	582.1
Most Intermodal Mileage	Million Miles
Roadway Express, Akron, Oh.	59.7
Consolidated Freightways, Portland, Ore.	42.2
Yellow Freight System, Overland Park, Kan.	40.9
Highest Revenue Per Mile	Rev./Mile
A-P-A Transport, North Bergen, N.J.	\$9.97
New Penn Motor Express, Lebanon, Pa.	\$7.32
TNT Red Star Express, Auburn, N.Y.	\$6.71
Highest Insurance Cost as a % of Revenues	Percentage
TNT Holland Motor Express, Holland, Mich.	1.43%
United Parcel Service, Atlanta, Ga.	1.50%
Hyman Freightways, St. Paul, Minn.	1.65%
Highest Interest as a % of Total Expenses	Percentage
AAA Cooper Transportation, Dothan, Ala.	3.58%
Willig Freight Lines, San Francisco, Calif.	3.39%
Saia Motor Freight Line, Houma, La.	3.18%

Motor vehicle carriers

Highest Revenue Per Mile	Rev./Mile
M&G Convoy, Troy, Mich.	\$2.94
Anchor Motor Freight, Birmingham, Mich.	\$2.91
Commercial Carriers, Troy, Mich.	\$2.62
Highest Revenue Per Ton	Rev./Ton
Complete Auto Transit, Troy, Mich.	\$93.25
Anchor Motor Freight, Birmingham, Mich.	\$82.61
Allied Systems, Decatur, Ga.	\$79.51
Highest Insurance as a % of Revenue	Percentage
Complete Auto Transit, Troy, Mich.	2.98%
Commercial Carriers, Troy, Mich.	3.12%
Allied Systems, Decatur, Ga.	5.01%
Highest Interest as a % of Revenue	Percentage
Allied Systems, Decatur, Ga.	2.11%
Anchor Motor Freight, Birmingham, Mich.	1.45%
M&G Convoy, Troy, Mich.	0.66%

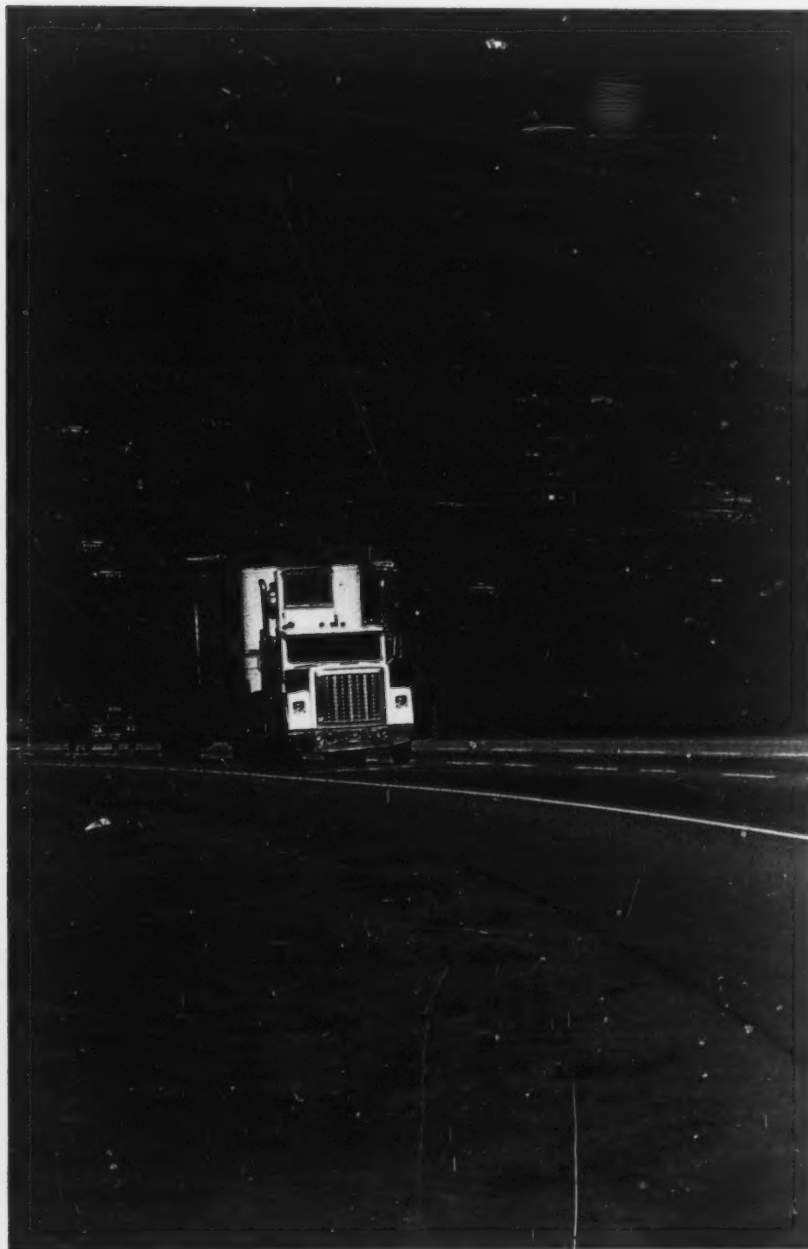
Reefer operations

Highest Revenue Per Mile	Rev./Mile
FFE Transportation Service, Dallas, Te	\$1.63
Marten Transport, Mondovi, Wisc.	\$1.12
KLLM Transport Services, Jackson, Miss.	\$1.11
Highest Revenue Per Ton	Rev./Ton
C.R. England & Sons, Salt Lake City, Ut.	\$101.21
FFE Transportation Service, Dallas, Tex.	\$99.38
Midwest Coast Transport, Sioux Falls, S.D.	\$88.58
Highest Insurance as a % of Revenue	Percentage
C.R. England & Sons, Salt Lake City, Ut.	2.03%
Monfort Transportation, Greeley, Colo.	2.36%
National Carriers, Liberal, Kan.	2.63%
Highest Interest as a % of Revenue	Percentage
Freymiller Trucking, Bakersfield, Calif.	4.93%
Marten Transport, Mondovi, Wisc.	3.16%
KLLM Transport Services, Jackson, Miss.	3.12%

TOP 100 and Trends & Statistics are available in a booklet for \$10. For a copy, or copies, write on company letterhead to: Carol Hope-Heavens, Reprint Editor, Commercial Carrier Journal, 1 Chilton Way, Radnor, Pa. 19089. Send prepaid check or money order.

1992 INDUSTRY TRENDS & STATISTICS

By **MATTHEW R. HOGAN**, Market Research Editor, and **JERRY STANDLEY**, Editor-In-Chief



There has been little to celebrate for the past few years about equipment sales to motor carriers. And 1991 was no different.

Last year did nothing to upset the declining sales pattern for truck equipment suppliers. Normally, in a presidential election year, business can count on an improving economy. And despite efforts of the Bush Administration to put some air into the flat U.S. economy, most forecasters are keeping their heads down about their projections for this year and next.

Caution appears to be the watchword. While most suppliers experienced buoyant sales activity in the second quarter this year, few have enough confidence in those sales levels to revise upward what were generally conservative business plans for 1992 put together late last year. Those plans called for 110,000 to 125,000 Class 8 units in 1992.

Engine makers would have you believe they are at the worst end of the equipment sales depression.

There is ample evidence to support that claim, provided by Henry Schacht, chairman and ceo, Cummins Engine Co., Columbus, Ind. He says trucking's current recession began in 1989. For the manufacturer, however, there has been no growth in the market for the past 20 years.

"We're operating at sales levels of 1970 today," says Schacht.

Text continues on page 84

TRENDS & STATISTICS

This chart tracks six years of Class 1-8 domestic truck factory sales. Class 8, the sales bellweather, fell off in 1991 for the third consecutive year, dropping 21.6% (23,150 units). That follows a 16.3% (20,855 units) drop in 1990, and a 5.4% (7,249 units) decrease in 1989, the year the current economic recession began. That's a net loss of 51,254 unit sales in three years. The sales record is equally bad for Classes 6 and 7, off 33% and 10.2% respectively, also for the third

year. As a group, Classes 6, 7, 8 are down 21.7% (44,373 units) in 1991.

The pressure took a toll on Scania U.S.A., announcing last month they will stop importing trucks from Sweden to the U.S. market, effective December 31, 1992. There are an estimated 700 Scania's on the road here. Officials says they will continue parts and service support through 17 dealers in the Northeastern states.

1991 trailer shipments (page 82) were down 15%. At the annual Truck

Trailer Manufacturers Association meeting last April, Peter Toja, V.P. Economic Consulting and Planning Inc. of New York said 1992 trailer shipments should rebound 14% to 145,000 units. In 1993 we could see a return to a healthy sales year at 169,000 units. As always, van trailer shipments will lead any sales uptick. Look for construction type, bulk, and lowbed trailers to increase in production as the economy picks up steam in the months ahead.

DOMESTIC TRUCK FACTORY SALES BY GVW

	1991	1990	1989	1988	1987	1986
CLASS 1 (Up to 6,000 lb GVW)						
Total Sales	2,267,143	2,377,468	2,447,962	2,496,648	2,270,566	1,964,832
Diesel Sales	485	337	107	86	1,813	4,999
% Diesel	-	-	-	-	0.1%	0.3%
CLASS 2 (6,001-10,000 lb)						
Total Sales	594,435	848,690	1,057,067	1,020,515	976,803	927,462
Diesel Sales	76,739	94,030	88,636	79,535	85,125	96,443
% Diesel	12.9%	11.1%	8.4%	7.8%	8.7%	10.4%
CLASS 3 & 4 (10,001-16,000 lb)						
Total Sales	3,547	693	54	86	476	-
Diesel Sales	34	55	54	86	322	-
% Diesel	1.0%	7.9%	100.0%	100.0%	67.6%	-
CLASS 5 (16,001-19,500 lb)						
Total Sales	28	1,644	4,197	5,224	5,841	5,749
Diesel Sales	-	51	3,559	1,599	431	-
% Diesel	-	3.1%	84.8%	30.6%	7.4%	-
CLASS 6 (19,501-26,000 lb)						
Total Sales	10,915	16,288	16,327	29,332	17,092	17,846
Diesel Sales	7,122	11,458	10,475	17,429	9,184	9,265
% Diesel	65.2%	70.3%	64.2%	59.4%	53.7%	51.9%
CLASS 7 (26,001-33,000 lb)						
Total Sales	54,140	66,990	71,340	79,143	84,341	77,597
Diesel Sales	42,641	53,957	55,568	56,574	56,719	47,694
% Diesel	78.8%	80.5%	77.9%	71.5%	67.2%	61.5%
CLASS 8 (33,001 lb & heavier)						
Total Sales	83,875	107,025	127,880	135,129	121,425	103,216
Diesel Sales	83,872	107,002	127,826	134,981	121,192	102,671
% Diesel	100.0%	100.0%	100.0%	99.9%	99.8%	99.5%
TOTALS						
Total Sales	3,014,083	3,418,798	3,724,827	3,766,077	3,476,544	3,096,702
Diesel Sales	210,893	266,890	286,225	290,290	274,786	261,072
% Diesel	7.0%	7.8%	7.7%	7.7%	7.9%	8.4%

Source: Total Sales: MVMA Report FS-3 (FACTORY SALES - U.S. Domestic); Diesel Sales: MVMA Report FS-5 (Trucks With Diesel Engines - U.S. Domestic)

TRENDS & STATISTICS

TRUCK FACTORY SALES (U.S. domestic only; excluding tactical military vehicles and school bus chassis)

GVW	Class 1 Up to 6000 lb		Class 2 6,001 - 10,000 lb		Class 3 10,001 - 14,000 lb		Class 4 14,001 - 16,000 lb		Class 5 16,001 - 19,500 lb		Class 6 19,501 - 26,000 lb	
SALES YEAR	90 sales	91 sales	90 sales	91 sales	90 sales	91 sales	90 sales	91 sales	90 sales	91 sales	90 sales	91 sales
Chevy	791,202	656,168	217,276	140,037	-	-	464	2,340	51	12	2,014	1,628
GMC	191,587	164,371	77,095	50,298	-	-	174	1,175	1,593	16	2,036	3,165
Oldsmobile	29,319	32,246	-	-	-	-	-	-	-	-	-	-
Pontiac	33,332	22,701	-	-	-	-	-	-	-	-	-	-
Chrysler	268,862	306,429	55,414	49,265	-	-	-	-	-	-	-	-
Ford	758,270	767,661	492,685	353,718	-	-	-	-	-	-	4,817	2,656
Freightliner	-	-	-	-	-	-	-	-	-	-	0	99
International	-	-	-	-	-	-	55	32	-	-	6,922	2,946
Jeep	131,003	127,697	6,220	1,117	-	-	-	-	-	-	-	-
Kenworth	-	-	-	-	-	-	-	-	-	-	-	-
Mack	-	-	-	-	-	-	-	-	-	-	-	-
Mercedes	-	-	-	-	-	-	-	-	-	-	499	421
Peterbilt	-	-	-	-	-	-	-	-	-	-	-	-
Volvo GM	-	-	-	-	-	-	-	-	-	-	-	-
Others	173,893	189,870	-	-	-	-	-	-	-	-	-	-
TOTAL	2,377,468	2,267,143	848,690	594,435	0	0	693	3,547	1,644	28	16,288	10,915

TRUCK RETAIL SALES (Data includes built-up and CKD units assembled in the U.S.)

GVW	Class 1 Up to 6000 lb		Class 2 6,001 - 10,000 lb		Class 3 10,001 - 14,000 lb		Class 4 14,001 - 16,000 lb		Class 5 16,001 - 19,500 lb		Class 6 19,501 - 26,000 lb	
Sales Year	90 sales	91 sales	90 sales	91 sales	90 sales	91 sales	90 sales	91 sales	90 sales	91 sales	90 sales	91 sales
Chrysler	2,891	5,236	0	0	0	0	0	0	0	0	0	0
Dodge	349,079	328,800	109,018	109,374	7,856	10,595	0	0	0	0	0	0
Plymouth	171,527	173,373	0	0	0	0	0	0	0	0	0	0
Jeep	190,699	174,602	6,164	3,173	0	0	0	0	0	0	0	0
Total Chrysler	714,196	682,011	115,182	112,547	7,856	10,595	0	0	0	0	0	0
Ford	778,064	764,976	569,372	446,678	0	0	26,057	19,667	0	0	6,444	5,078
Freightliner	0	0	0	0	0	0	0	0	0	0	0	41
Chevrolet	933,192	832,026	309,032	233,768	678	747	103	1,806	247	126	8,944	2,730
GMC	221,675	200,701	103,390	83,264	1,280	1,459	25	999	1992	427	5,817	3,740
Oldsmobile	26,075	31,818	0	0	0	0	0	0	0	0	0	0
Pontiac	29,875	23,682	0	0	0	0	0	0	0	0	0	0
Total GM	1,210,817	1,088,227	103,390	317,032	1,958	2,206	128	2805	2239	553	14,761	6,470
Hino	0	0	0	0	309	192	0	87	516	410	660	546
Isuzu	0	0	0	0	6,624	5,800	685	1243	375	901	1,824	812
Iveco	0	0	0	0	1,613	0	525	0	240	0	160	0
Kenworth	0	0	0	0	0	0	0	0	0	0	0	0
Mack	0	0	0	0	0	0	0	0	0	0	1,051	504
Mazda	3,409	11,404	0	0	0	0	0	0	0	0	0	0
Mercedes-Benz	0	0	0	0	0	0	0	0	0	0	535	428
Mitsubishi Fuso	0	0	0	0	1,852	1,762	0	0	649	639	263	393
Navistar	0	0	0	0	0	0	58	27	115	26	11,943	7,623
Nissan	134,260	129,633	0	0	0	0	0	0	0	0	0	0
Nissan Diesel	0	0	0	0	661	701	0	0	921	772	534	550
Peterbilt	0	0	0	0	0	0	0	0	0	0	0	0
Scania	0	0	0	0	0	0	0	0	0	0	0	0
Subaru-Isuzu	21,626	42,996	0	0	0	0	0	0	0	0	0	0
Suzuki	3,365	3385	0	0	0	0	0	0	0	0	0	0
Toyota	0	1,002	0	0	0	0	0	0	0	0	0	0
VolvoGM Heavy	0	0	0	0	0	0	0	0	0	0	0	0
Western Star	0	0	0	0	0	0	0	0	0	0	34	0
Other Domestic	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	2,865,737	2,723,634	1,096,976	876,257	20,873	21,256	27,453	23,829	5,055	3,301	38,209	22,445

Source: MVMA U.S. RETAIL SALES OF TRUCKS - RS-3S

Class 7 26,001 - 33,000 lb		Class 8 33,001+ lb		GRAND TOTAL		GVW
90 sales	91 sales	90 sales	91 sales	90 sales	91 sales	Sales Year
7,007	5,288	-	-	1,018,014	805,473	Chevy
13,677	11,493	12	16	286,174	230,534	GMC
-	-	-	-	29,319	32,246	Oldsmobile
-	-	-	-	33,332	22,701	Pontiac
-	-	-	-	324,276	355,694	Chrysler
24,316	17,400	12,358	7,757	1,292,446	1,149,192	Ford
-	393	21,626	20,644	21,626	21,136	Freightliner
20,995	17,507	19,766	15,855	47,738	36,340	International
-	-	-	-	137,223	128,814	Jeep
-	-	12,825	10,088	12,825	10,088	Kenworth
-	-	13,665	8,390	13,665	8,390	Mack
995	835	-	-	1,494	1,256	Mercedes
-	-	11,903	9,520	11,903	9,520	Peterbilt
-	1,224	14,247	11,209	14,247	12,433	VolvoGM
-	-	623	396	174,516	190,266	Others
66,990	54,140	107,025	83,875	3,418,798	3,014,083	TOTAL

FACTORY VS. RETAIL SALES

U.S. domestic truck factory sales figures are reported by members of the Motor Vehicle Manufacturers Association. These are the traditional source for year-to-year comparisons of truck production and sales activity. While not every truck supplier in the U.S. is a member of the MVMA, all of the big ones are. Thus, factory sales figures are a reasonable measure of domestic truck production.

But, factory sales figures only illustrate the number of trucks produced from facilities on American soil. In 1990 that was only 80% of the commercial truck sales activity in America. There is more truth to be told about the vitality of the truck building business in America.

Truck retail sales figures, also published by the MVMA, provide the best picture of truck sales activity in the U.S. For instance, retail sales figures include the number of commercial trucks sold in the U.S. by European and Asian importers. Those do not show up in the MVMA's factory sales report. Neither do export sales from domestic producers, like Freightliner and Kenworth, two examples of domestic builders enjoying a robust export business.

Factory sales figures do not reflect commercial truck sales resulting from joint venture agreements between foreign and domestic suppliers, such as the Isuzu medium duty trucks distributed and sold under the GM nameplate.

So, focus on retail sales for the best perspective on truck sales activity in the U.S. commercial truck market.

Class 7 26,001 - 33,000 lb		Class 8 33,001+ lb		GRAND TOTAL		GVW
90 sales	91 sales	90 sales	91 sales	90 sales	91 sales	Sales Year
0	0	0	0	2,891	5,236	Chrysler
0	0	0	0	465,953	448,769	Dodge
0	0	0	0	171,527	173,373	Plymouth
0	0	0	0	196,863	177,775	Jeep
0	0	0	0	837,234	805,153	Total Chrysler
26,465	18,451	13,103	8,479	1,419,505	1,263,329	Ford
0	210	23,032	22,617	23,032	22,868	Freightliner
7,278	5,912	0	0	1,259,474	1,077,115	Chevrolet
14,526	12,944	0	0	348,705	303,534	GMC
0	0	0	0	26,075	31,818	Oldsmobile
0	0	0	0	29,875	23,682	Pontiac
21,804	18,856	0	0	1,355,097	1,436,149	Total GM
943	680	0	0	2,428	1,915	Hino
572	242	0	0	10,080	8,998	Isuzu
0	0	0	0	2,538	0	Iveco
389	307	14,620	11,752	15,009	12,059	Kenworth
1,404	676	14,350	10,480	16,805	11,660	Mack
0	0	0	0	3,409	11,404	Mazda
1,105	901	0	0	1,640	1,329	Mercedes-Benz
559	333	0	0	3,323	3,127	Mitsubishi Fuso
30,422	30,050	27,800	22,824	70,338	60,550	Navistar
0	0	0	0	134,260	129,633	Nissan
493	374	0	0	2,609	2,397	Nissan Diesel
359	213	11,970	9,396	12,329	9,609	Peterbilt
0	0	103	50	103	50	Scania
0	0	0	0	21,626	42,996	Subaru-Isuzu
829	0	14,767	0	18,961	3,385	Suzuki
0	0	0	0	0	1,002	Toyota
0	1,305	935	12,113	935	13,418	VolvoGM Heavy
1	0	644	606	679	606	Western Star
0	0	0	413	0	413	Other Domestic
85,345	72,598	121,324	98,730	4,260,972	3,842,050	TOTAL

TOP: These are 1990 and 1991 MVMA factory sales data from U.S. plants only. Data do not include sales of certain vehicles resulting from joint venture agreements between foreign and domestic suppliers. VolvoGM does not report separate sales figures for Class 8 Volvo, WhiteGMC and Autocar nameplates. Those figures are reported as one combined number. *Others includes Nissan, Marmon, Oshkosh.

BOTTOM: Retail sales figures give the most accurate picture of commercial truck sales in America. For particulars, see the "Factory vs. Retail Sales" section at the top of this page.

TRENDS & STATISTICS

15 YEAR TRUCK FACTORY SALES BY GVW (1977 - 1991)

CLASS 1 6,000 lb & less	No. of Units 25,831,357	% of Total 55.77%
CLASS 2 6,001 - 10,000 lb	No. of Units 16,540,981	% of Total 35.71%
CLASS 3 10,001 - 14,00 lb	No. of Units 142,052	% of Total 0.31%
CLASS 4 14,001 - 16,000 lb	No. of Units 15,929	% of Total 0.03%
CLASS 5 16,001 - 19,500 lb	No. of Units 61,359	% of Total 0.13%
CLASS 6 9,501 - 26,000 lb	No. of Units 788,610	% of Total 1.70%
CLASS 7 26,001 - 33,000 lb	No. of Units 983,431	% of Total 2.12%
CLASS 8 33,001 lb & over	No. of Units 1,953,003	% of Total 4.22%
TOTAL	46,316,722	100.00%

Source: MVMA. These totals include 1977-1991 U.S. domestic and export factory sales, excluding tactical military vehicles and buses, for most truck manufacturers. R.L. Polk & Co. reports the total truck population to be 58,178,883 as of July 1, 1991. The Polk data include imported vehicles, school buses and private fleet buses, but not municipal buses. The number of school buses is known to be understated, Polk says, because of varying registration procedures among the states. For more details call the R.L. Polk Truck Group at 313-393-0880.

TRENDS & STATISTICS

TRAILERS IN USE (15-year new trailer shipments 1977 - 1991)

VANS		Number	% of Total
Dry Freight/closed	.....	1,205,584	49.6%
Dry Freight/open	.....	56,505	2.3%
Insulated/semi-ins	.....	319,336	13.1%
Drop Frame	.....	74,279	3.1%
Livestock	.....	21,446	0.9%
Total Vans	.....	1,677,150	69.0%
SPECIAL TYPES			
Tanks, liquid	.....	86,911	3.6%
Dry Bulk	.....	25,707	1.1%
Pole, logging	.....	22,160	0.9%
Platform	.....	285,604	11.7%
Low-Bed	.....	121,415	5.0%
Dump	.....	114,412	4.7%
All Other	.....	97,680	4.0%
Total Special	.....	753,889	31.0%
TOTAL COMPLETE TRAILERS	.....	2,431,039	100.0%
Detachable Trailers ⁽¹⁾		55,978	
Detachable Chassis ⁽²⁾		296,896	
Dollies & Converter Gear ⁽³⁾		60,304	
Total	.....	413,178	
GRAND TOTAL	.....	2,844,217	

Source: Industry Division, Bureau of Census, Dept. of Commerce. Compiled by CCJ Marketing Dept.

1-Mostly container units. 2-Most used with containers. 3-Separate axle and fifth wheel assembly used to connect semi-trailers for double and triple trailers.

ABOVE: The useful life of a trailer can be stretched beyond 15 years depending on how one is used. This chart assumes a 15-year life because the majority of trailers older than that are in non-traditional use, such as storage trailers.

RIGHT: Trailer shipments declined an additional 15% last year compared to 1990. The only trailer segment that increased shipments was tank type, by 5.2%. Van trailers, which experienced a steep drop in 1990, declining 26,269 units, dropped half as much again in 1991, 13,800 units. Special type trailers continued their slide in 1991, almost 19%. The hardest hit groups were dry bulk and pole/logging trailers.

Note: The Dept. of Commerce continually revises its trailer data, which is the basis for this chart. These figures reflect the DOC revisions issued since July, 1991.

NEW TRAILER SHIPMENTS BY TYPE (1987-1991)

TYPE OF TRAILER	1991 ^(P)	1990 ^(P)	1989 ^(P)	1988 ^(P)	1987 ^(P)
VANS					
Dry Freight/closed	66,641	72,771	94,027	96,390	99,054
Dry Freight/open	3,266	4,095	3,217	3,254	2,776
Insulated/semi-ins	17,232	21,401	24,887	24,862	26,650
Drop Frame	1,972	4,475	6,267	5,974	5,237
Livestock	983	1,152	1,765	1,511	1,663
Total Vans	90,094	103,894	130,163	131,991	135,380
SPECIAL TYPES					
Tanks, liquid	4,676	4,444	4,789	5,075	4,636
Dry Bulk	1,039	1,540	1,848	1,065	1,358
Pole, logging	306	861	780	710	832
Platform	11,323	13,479	18,411	17,648	14,975
Low-Bed	6,573	8,147	9,586	10,508	8,254
Dump	4,596	6,733	7,860	9,295	8,181
All Other	8,297	10,019	8,041	10,191	6,526
Total Special Types	36,810	45,223	51,315	54,492	44,762
TOTAL COMPLETE TRAILERS	126,904	149,117	181,478	186,483	180,142
Detachable Trailers ⁽¹⁾	-	-	-	5,223	438
Detachable Chassis ⁽²⁾	⁽²⁾ 18,990	17,214	24,779	37,729	23,014
Dollies & Converter ⁽³⁾	1,832	2,272	2,668	2,917	4,614
Total	20,822	19,486	27,447	45,869	28,066
GRAND TOTAL	147,726	168,603	208,925	232,352	208,208

Source: Industry Division, Bureau of Census, Dept. of Commerce. Compiled by CCJ Marketing Dept.

P- Preliminary data. r- Revised data. 1- Mostly container units. 2- Figure combined with detachable trailers beginning 1989. 3- Primarily for use with containers. 4- Separate axle and 5th wheel assembly used for twin-trailer and triple-trailer combinations.

TRENDS & STATISTICS

DIESEL ENGINES USED IN TRUCKS

(Factory sales from U.S. plants including exports)

Make	Year	Cat	Cummins	Detroit Diesel	Inter-national	Mack	Other	TOTAL
Chevy	1991	4,079	-	7,471	-	-	-	11,550
	1990	4,361	-	9,721	-	-	-	14,082
Ford	1991	2,125	3,470	482	44,011	-	19,287	69,375
	1990	4,194	6,116	48	58,773	-	27,157	96,288
Freightliner	1991	4,575	6,584	10,728	-	-	19	22,006
	1990	7,059	9,438	5,746	-	-	-	22,243
GMC	1991	8,706	194	4,025	-	-	1,572	14,497
	1990	11,372	344	5,265	-	-	3	16,984
Int'l	1991	1,185	9,681	1,759	29,711	-	-	42,336
	1990	1,113	15,126	-	38,694	-	-	54,933
Jeep	1990	-	-	-	-	-	3,804	3,804
	1990	-	-	-	-	-	0	-
Kenworth	1991	2,582	4,639	3,833	-	-	-	11,054
	1990	5,752	5,117	2,684	-	-	-	13,553
Mack	1991	22	78	-	-	10,208	82	10,390
	1990	49	64	-	-	15,028	102	15,243
Mercedes	1991	-	-	-	-	-	1,293	1,293
	1990	-	-	-	-	-	1,610	1,610
Peterbilt	1991	5,458	2,337	2,511	-	-	-	10,306
	1990	7,589	3,359	1,853	-	-	-	12,801
Volvo GM	1991	2,949	5,651	3,968	-	-	1,411	13,979
	1990	2,902	8,707	3,585	-	-	572	15,766
All Other	1991	102	147	180	-	-	-	429
	1990	216	301	129	-	-	-	646
Total	1991	31,783	32,881	34,957	73,722	10,208	27,468	211,019
	1990	44,607	48,572	29,031	97,467	15,028	29,444	264,149

LEFT: Reporting firms do not represent the entire industry. "Other" includes Isuzu, Mercedes-Benz, Scania-Vabis, Volvo and Ford. "All Other" includes Oshkosh and Marmon. *Not included are 27,465 Cummins engines in Chrysler vehicles.

There has been little to celebrate for years now among U.S. diesel engine makers. Things don't seem to be looking up any time soon, either. U.S. factory sales in 1991 dropped 20.1% on top of an 11.4% decline in 1990, and a 5% drop in 1989. The only upbeat note in the figures displayed in this chart is the renewed interest in Detroit Diesel, which suffered sharp declines in market share in recent years. While every engine maker's production declined in 1991, Detroit Diesel increased sales by 5,926 units. That's a 20.41% increase over the previous year. Detroit's market share moved up to 16.6%, in second place behind number one International's 34.9% share of the market.

Text is continued from page 75

Fewer trucks are doing more work. Productivity improvements have been gained by motor carriers over the years in terms of vehicle size and weight regulations which allow progressively longer vehicle combinations and trailers with heavier payloads, and more efficient routing and dispatch schemes. Those gains have offset what otherwise would have created long term increases in equipment demand—diesel engines for example. The result of those gains is heavy commercial truck production today still averages 120,000 units annually, with 160,000 unit peaks, but 75,000 unit valleys.

Schacht says, engine makers have been forced to seek global partners to increase economy of scale, and

pursue global markets to generate higher sales volumes. All of that to compete in a mature market that is not growing from the equipment supplier's point of view. At the same time, "there is an enormously disproportionate need for technological developments (such as those required to keep pace with the Environmental Protection Agency's tough heavy duty diesel emissions regulations)," Schacht says.

So, it's a challenge, even for world-class diesel engine makers, to meet emissions requirements, user demands and also to sustain R&D throughout the 90s. Cummins R&D spending in 1970 was \$20 million. In 1980 it was \$80 million. Last year it was \$235 million.

The good news is, "The basic

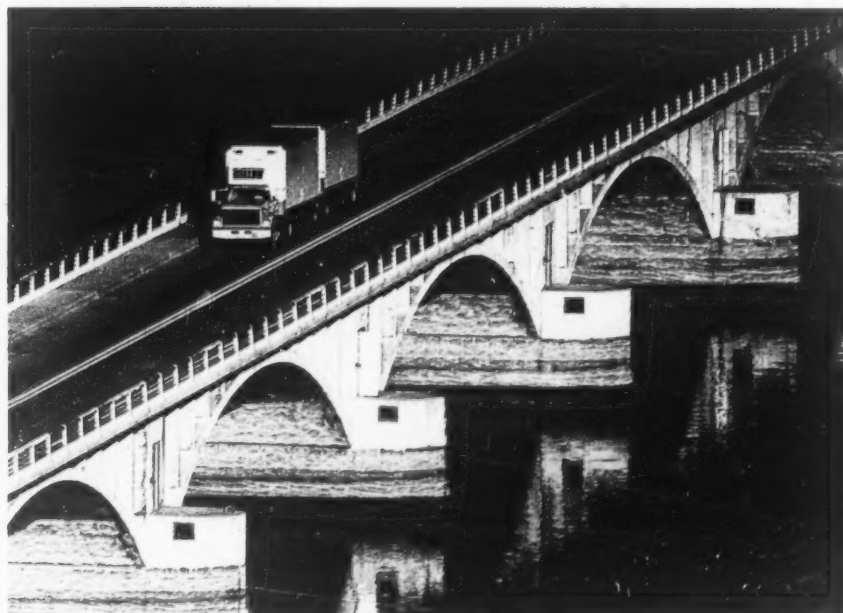
recipe for the diesel engine has settled down. We can meet diesel emissions requirements through the turn of the decade with current technology (CCJ Nov. '91, *1994 Diesels Revealed*)."

The year 2002 is when the next generation of emissions rulemaking will determine whether the diesel will continue to be the cost-effective power of choice, says Schacht.

Between now and then, "We must design the truck service systems of tomorrow." A priority is electronic engine maintenance. Only 5% of the Class 8 fleet is electronic, Schacht says, so the problem will only get bigger, made worse by the shortage of trained mechanics. Diagnostic tools and the compatibility of those tools among various engine makers' products is another problem. □

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COMPOSITE TRAILER BOWS AT ITS—A futuristic flatbed, built by Trail King Industries, debuted at ITS. Dubbed NXT7000, the new trailer is claimed to be far stronger and up to 2,000 lb lighter than its steel and aluminum counterparts.

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4 COMMERCIAL CARRIER JOURNAL September 1992

Fruehauf optimistic about sales and profits

Shipments of new trailers by U.S. manufacturers are expected to improve "almost 27% to 160,300 units" in 1992, according to Arthur E. Roe, president and ceo of Fruehauf Trailer Corp.

Vans will make up 76%—121,400—of that total, he said. That's a 35% improvement over the 90,000 van shipments made in 1991.

And in 1993, shipments will increase to 176,700 units, primarily vans, added Roe, at a recent press conference at the International Trucking Show in Anaheim, Calif.

Other segments of the U.S. trailer industry will have "modest growth" next year, noted Roe:

- Platforms and lowbeds (12% of the total market) will increase to 19,100 units.

- Dumps trailers (3% of the total) will be flat at about 4,500 units.

- Liquid and dry bulk trailers (3.5% of the total) will make a slight gain.

Regarding Fruehauf's sales, Roe noted that domestic trailer shipments in the first quarter of this year were up 40%, compared to the same period in 1991. And market share rose 20% in the first quarter of 1992 over last year's first quarter.

Fruehauf has increased production rates at its Fort Madison, Ia. and Waverly, Oh. van plants to meet its share of the industry's growing van market.

Financial improvement

The Southfield, Mich.-based company's financial situation also has improved.

Roe said debt has been reduced by \$62 million, primarily via an initial public offering of stock. As a result, more than \$100 million of the debt has been repaid since Terex Corp., Green Bay, Wis., bought Fruehauf. And interest

expense has been cut at a 60% annualized rate. Those efforts make Fruehauf "well on our way to being virtually debt-free in the near term," said Roe.

Fundamental strengths

Roe also cited the company's four "fundamental strengths" which make Fruehauf:

1. the world's leading name-plate. Fruehauf trailers are built in 20 countries and are sold on every continent except Antarctica;

2. the "only true trailer manufacturer, actually building trailers from the ground up and producing key components such as aluminum sheet and extrusions, axles and suspensions ourself;"

3. North America's sales leader in new and used trailers;

4. the largest fleet by brand in service in North America, with the industry's largest distribution network and parts locations serving some 400,000 Fruehauf trailers.

To help maintain its position as an industry leader, Fruehauf has formed a partnership with EG&G Structural Kinematics, Troy, Mich., "to enhance the capabilities and reduce the cycle-time of our R&D work," said Roe.

The venture will allow Fruehauf to introduce "at least one new model

in each trailer segment every six months."

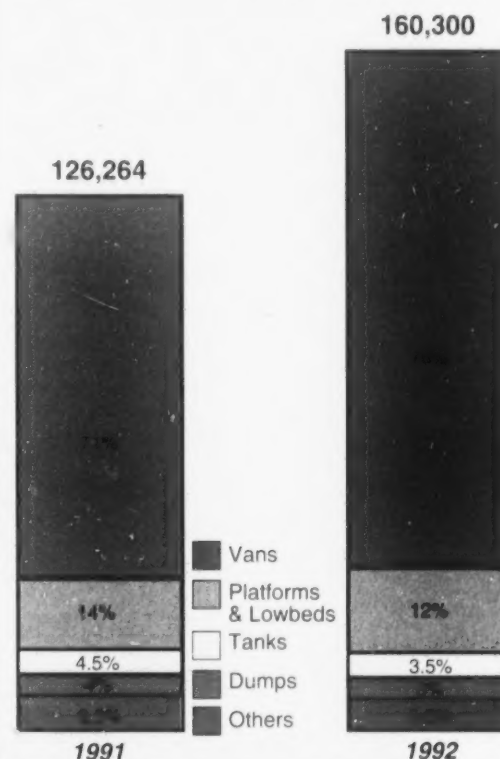
Chinese to make axles

Fruehauf also announced a joint venture with Shunde Guang Lian Hong Communication Machinery Manufacturing Co. Ltd. to produce Pro-Par trailer axles. The axles are especially designed by Fruehauf for markets in the People's Republic of China, Hong Kong and the Pacific Rim area.

They will be used on the container chassis the Chinese firm produces, as well as marketed in the Pacific Rim countries.

A new 70,000-sq-ft assembly facility in the city of Shunde will begin production in early 1993. In a few years, production is expected to reach 40,000 axles annually. □

Fruehauf forecast of the U.S. trailer market





Smaller fleets are hurting Big 3

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When we talk about the less-than-truckload industry, we often focus on the Big Three: Consolidated Freightways, Roadway and Yellow.

But T. Richard Holt claims, in an extensive research report, that the LTL sector is made up of three distinct groups, based on their average length of haul.

Holt is a financial analyst who follows the trucking market for the Butcher & Singer Div. of Wheat First Securities, Richmond, Va.

Using Holt's mileage criteria, LTL carriers are in one of these groups:

1. Over 1,000 miles: These long haulers are in a "mature, fully consolidated market that increasingly demonstrates commodity-like characteristics."

Holt projects this segment to have "modest" revenue growth and "limited ability to improve operating profitability."

This segment is vulnerable to intermodal competition from railroads, small package carriers and air freight services.

2. Less than 500 miles: As a whole, this highly-fragmented regional market "seems to be outgrowing" the overall economy.

That's because they can capitalize on new trends such as just-in-time inventories and decentralized distribution strategies.

3. Between 500 and 1,000 miles: This inter-regional market "seems to have the most potential."

This group was the hardest hit by deregulation, with the majority of carriers in the market having

exited the business, says Holt. But the survivors "seem positioned to capitalize on the growth opportunity inherent in the regional market, as well as exploit the secular pressures facing the long-haul LTL industry," he adds.

That's because, as the length of haul declines, competition from intermodal and air freight services diminishes for high-service, non-union regional and inter-regional carriers.

Holt also points out that a fleet's ability to provide high-quality service at a competitive price no longer is unique. Today, they also must be flexible. That means:

- Even unionized LTL carriers must have flexible work rules so they can meet shippers' special service requirements without driving up the cost.

- Hub-and-spoke systems are efficient in long-haul operations, but "their dependence on density becomes prohibitive from a service standpoint as length of haul declines."

Conversely, direct-load systems successfully operated by regional and inter-regional carriers offer flexibility to "maximize service and minimize cost in most traffic lanes, including selected lanes over 1,000 miles."

Performance comparisons

Holt's 1987-1991 LTL analysis is based on a comparison of operating performances of the regional/inter-regional group vs. long-haul carriers. Holt's primary source of data, which is synopsised in the chart below, was the carrier reports

Continued

Comparison of LTL Operating Performances

	Regional & Inter-Regional Carriers	Long-Haul Carriers
Average Operating Income	-9.9%	-31.1%
Average Total Revenue	+9.5%	+2.1%
Average Operating Ratio	89.7	96.0
Average LTL Tonnage	+9.4%	+0.9%
Average Total Shipments	+6.5%	-0.8%
Average Revenue per CWT	+0.4%	+1.7%
Average Revenue per Shipment	+2.8%	+2.9%
Average Cost per Shipment	+4.7%	+4.6%

Trucking profit margins less than 2%...again

Common carriers' profit margins were less than 2% for the third year in a row.

That figure is based on 1991 summary data on nearly 2,000 for-hire fleets, published in the 1992-93 edition of *TTS Blue Book of Trucking Companies*.

Last year, those fleets managed a 1.86% profit margin, in the aggregate, adds Ronald Roth, executive vice president of Transportation Technical Services, Fredericksburg, Va.

In addition to the current economic recession, Roth attributes the thin margins to the "continuation of severe competition and rate cutting between trucking companies."

Revenue per mile was \$1.84 for all carriers in the study. That's 5¢

per mile less than in 1990, noted Roth.

The profit margin for the first quarter of 1992 was 1.7%, "not too bad in this typically weak period," said Roth. But the much anticipated economic rebound appears to have stalled in the Summer months.

"Small general freight carriers (under \$5 million in annual revenues) in the less-than-truckload segment showed an operating ratio of 100.9," continued Roth.

"Their general freight counterparts in the truckload segment fared only slightly better with a 98.6 operating ratio."

Roth also noted that there was a record number of bankruptcies filed by motor carriers in 1991, according to Dun & Bradstreet.

The 1992-93 *TTS Blue Book* includes individual data on 1,866 U.S. fleets. In addition to financial data, the publication includes information on the carriers' equipment, mileage and tonnage hauled.

Comparable data also is published in a *TTS Blue Book* for the first quarter of 1992.

Information in both editions is based on carrier reports to the Interstate Commerce Commission and state public utility commissions. □

FHWA releases 1989 truck accident data

Truck accidents involving collisions with one or more other vehicles are responsible for 91% of fatalities, 83% of injuries and 73% of the property damage reported in a new study of 1989 truck accidents.

The statistics were compiled by the Federal Highway Administration. The report on truck accidents also noted:

- 1989's accident total was up 8%, compared to 1988.
- Fewer than 1 in 13 of accidents in 1989 resulted in fatalities. But more than half of those accidents produced injuries.
- 30% of the accidents occurred in California, Illinois, Ohio, Pennsylvania and Texas. And 40% of the fatalities happened in those same five states, plus Florida and North Carolina.
- 20% of those killed and 30% of those injured were drivers or occupants of trucks.
- Truck drivers not wearing seat belts were two times more likely to be killed in accidents than those using seat belts.
- 70% of truck accidents involved tractor-trailers.
- 70% the accidents occurred under favorable weather and road conditions. □

Smaller fleets are hurting Big 3

Continued

filed with the Interstate Commerce Commission.

Instead of using some large regional and inter-regional fleets whose 1991 operating ratios were 98 or above, Holt chose "well-positioned carriers that effectively execute sound operating strategies."

He acknowledged that the choices "should not be taken as being the norm for all carriers in these two industry segments."

Old Dominion and Overnite are the inter-regionals he selected for the group.

Regionals he used in the composite are: AAA Cooper, A-P-A Transport, Arkansas Freightways, Con-Way Transportation, Estes Express, New Penn, Saia, Southeastern, TNT Holland and Viking.

In addition to the Big Three, Holt chose to use ABF Freight and Carolina Freight in the long-haul group.

Unless there is "uncontrollable growth" that would shrink profits,

Holt expects the regional carriers to maintain annual growth rates of 10% to 15% over the next five years.

Inter-regionals have an opportunity to grow 15% to 20% over the next five years because:

- They can cherry-pick traffic from long-haul carriers burdened by restrictive work rules.
- A strong regional base of diverse customers allows these carriers to quickly build density when penetrating new inter-regional markets. Ultimately, a snowball effect unfolds. Conversely, when new inter-regional freight goes into a carrier's regional network, it tends the regional operations more cost and service efficient.
- Decentralized distribution and competition from other modes should continue to work against long-haul carriers.

After the current recession is over, "long-term earnings growth profits will prove to be no better than 6% to 8% annually." □